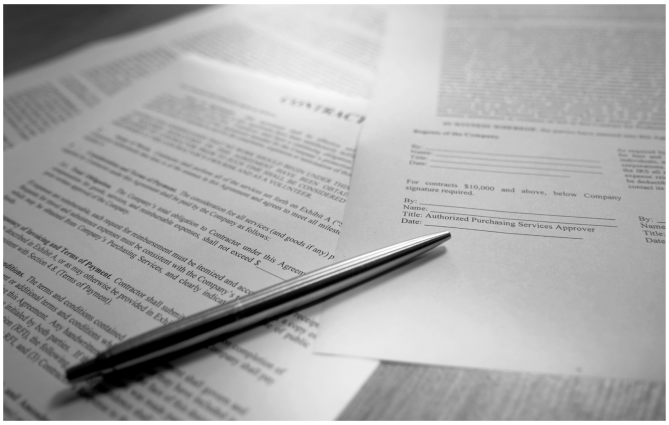

procserve

User Manual for Community Administrators of the Procserve Commerce Hub Release 4.7

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Software Version: 4.7.0

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1

About this Guide

1 About this Guide

1.1 Introduction

The aim of this guide is to give you a comprehensive guide on how to use the Procserve Commerce Network system effectively.

Who is Procserve?

Procserve is a Commerce Network. It connects buyers and suppliers together via a fully hosted eCommerce infrastructure. Procserve particularly specialises in providing and managing eProcurement and eInvoicing solutions and services for customers.

What does Procserve offer?

- Procserve offers packaged Commerce Solutions to enable our customers of all sizes and technical capabilities to connect to the Commerce Network
- All of our solutions are provided as software-as-a-service, with no requirement for capital investment in IT infrastructure

What do our solutions consist of?

The Procserve solutions are a blend of world-class application Commerce Modules, all hosted and managed by Procserve, combined with professional service packages that ensure a swift implementation and maximum return on investment.

The Procserve Commerce Network

Procserve offers two types of services, **commerce solutions** and **commerce services**. Regardless of what back office infrastructure organisations have, Procserve implements only those trading solutions needed to complete their ability to conduct electronic transactions between buyer and supplier. Procserve also provides services in order to implement these commerce solutions and exploit their capability. The level of services provided are entirely flexible.

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2
Procserve Commerce Network

2 Procserve Commerce Network

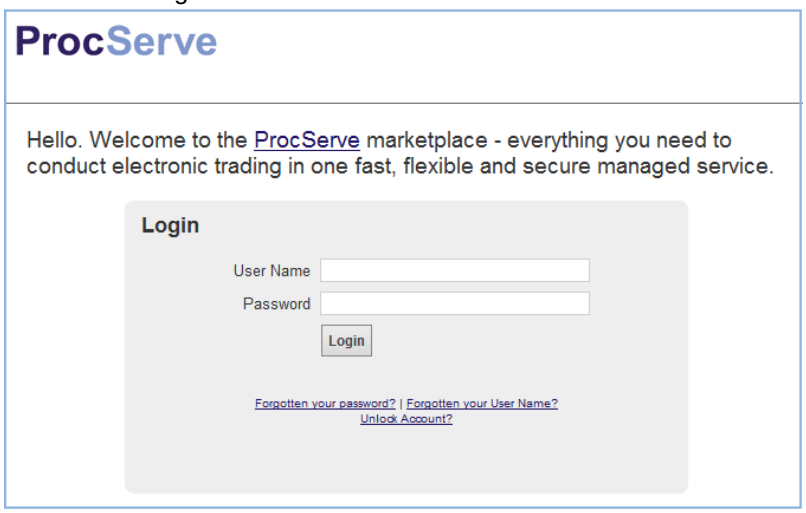
2.1 Procserve Commerce Hub Getting Started

2.1.1 Logging on to Procserve Commerce Hub

1. Navigate to the Procserve Commerce Hub URL:

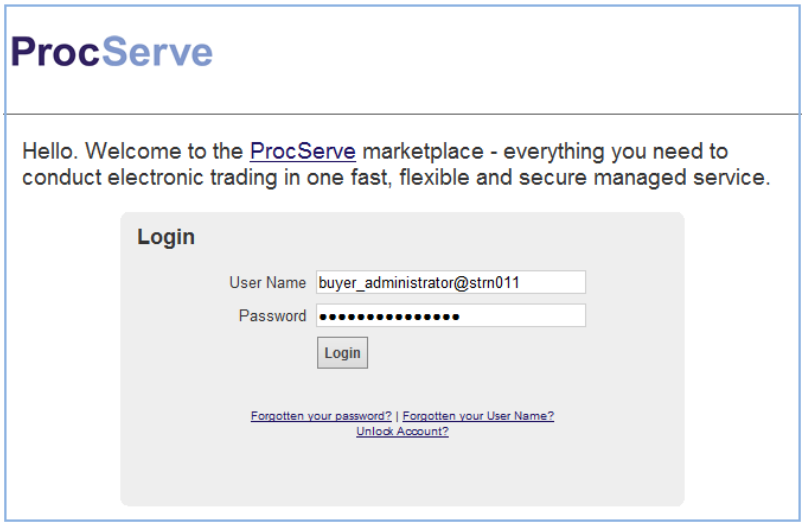
https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

You will be presented with the log in screen:


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name
Password
Login
Forgotten your password? | Forgotten your User Name?
Unlock Account?

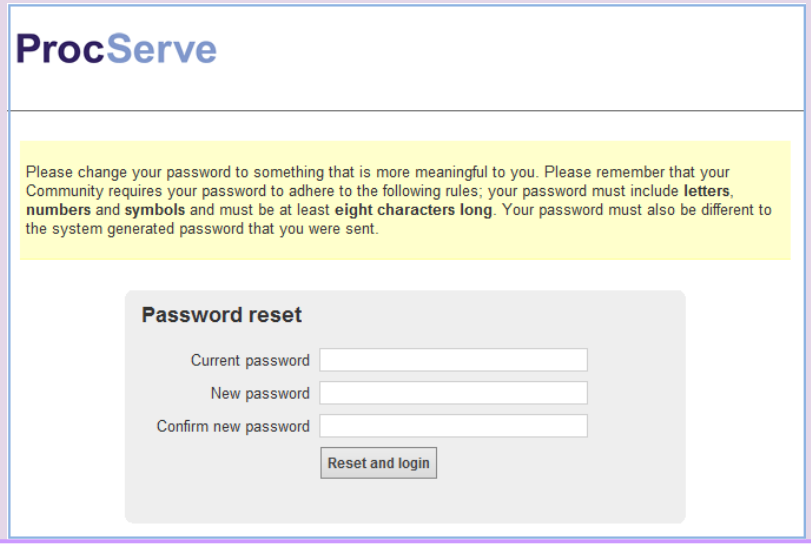
2. Enter your username and password:

Tip! You will have received these via email. It is sometimes easier to copy and paste the system generated password.

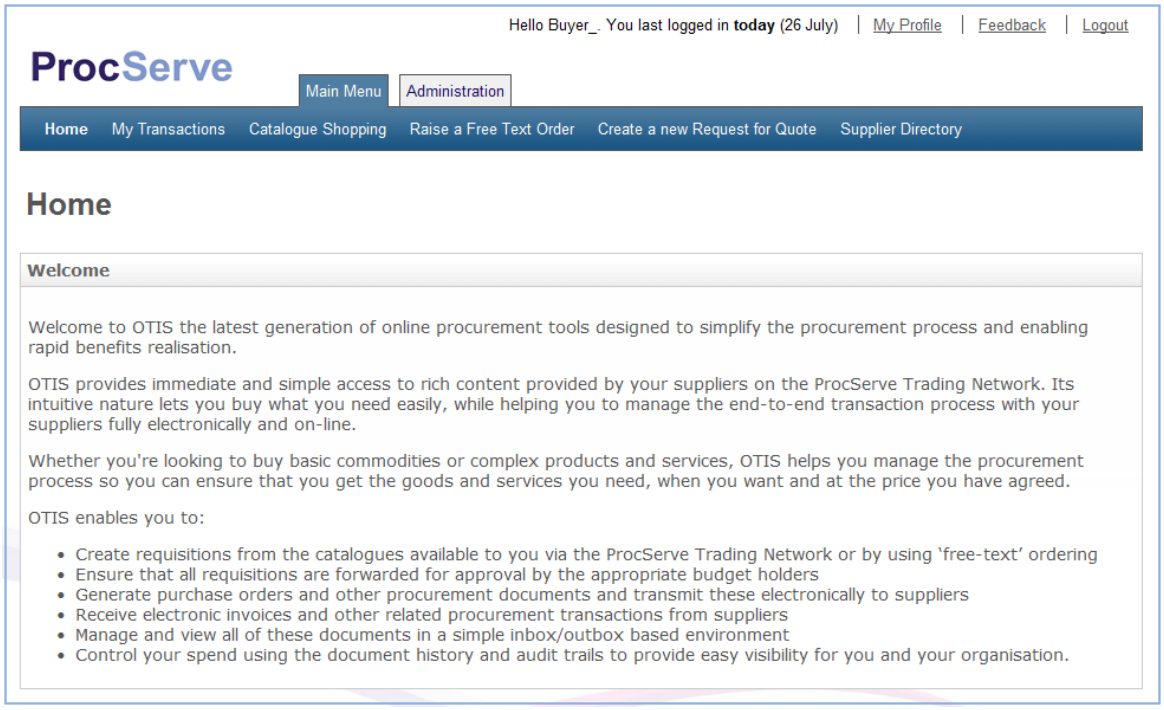

ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name buyer_administrator@strn011
Password
Login
Forgotten your password? | Forgotten your User Name?
Unlock Account?

© Procserve Holdings Limited 2012

Tip! If this is the first time you have logged in - you will be asked to reset your password and create a memorable word. The memorable word is used to reset your account should you lock it through multiple incorrect log in attempts:


ProcServe
Please change your password to something that is more meaningful to you. Please remember that your Community requires your password to adhere to the following rules; your password must include letters, numbers and symbols and must be at least eight characters long. Your password must also be different to the system generated password that you were sent.
Password reset
Current password
New password
Confirm new password
Reset and login

You will see the home page:


Hello Buyer_. You last logged in today (26 July) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using 'free-text' ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers
Receive electronic invoices and other related procurement transactions from suppliers
Manage and view all of these documents in a simple inbox/outbox based environment
Control your spend using the document history and audit trails to provide easy visibility for you and your organisation.

Note: The menus that you are presented with will depend on the roles your user has been given.

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2.1.2 Retrieving a Lost Password

Overview

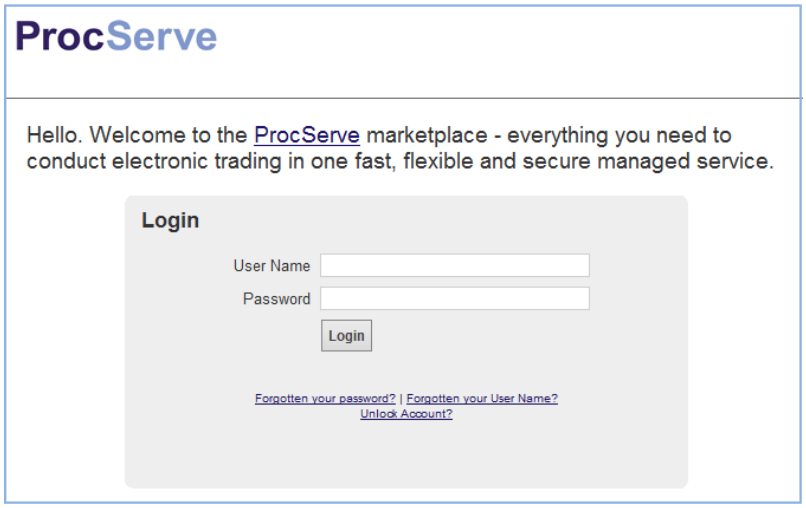
Should you forget your password, you can generate a system password which will be emailed to your registered account.

Retrieving a lost password

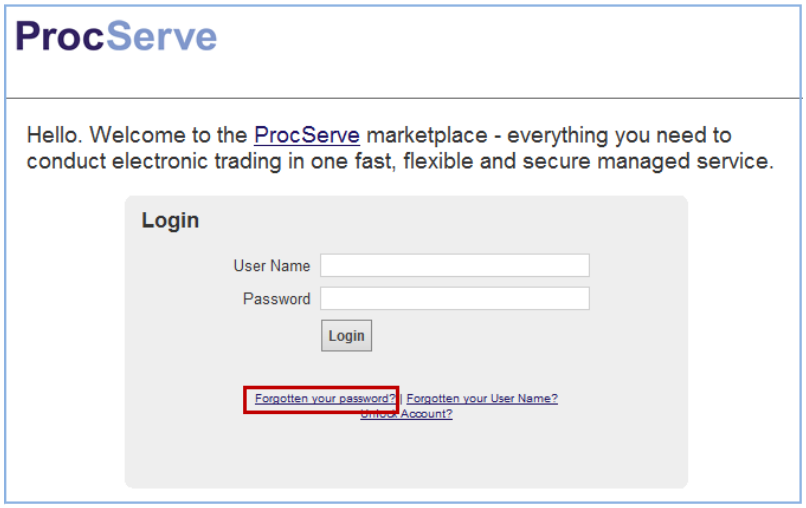
1. Navigate to the Procserve Commerce Hub URL:

https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

You will be presented with the log in screen:


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name
Password
Login
Forgotten your password? | Forgotten your User Name?
Unlock Account?

2. Click on the 'Forgotten your password?' link at the bottom of the page:


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name
Password
Login
Forgotten your password? | Forgotten your User Name?
Unlock Account?

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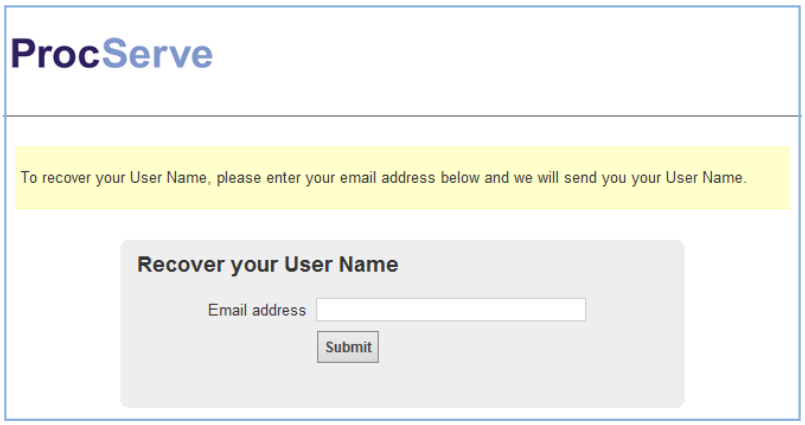
3. Enter your username:


ProcServe
To recover your User Name, please enter your email address below and we will send you your User Name.
Recover your User Name
Email address
Submit

4. Click 'Submit'

Note: Your password will be sent to you via email. The next time you log in you will have to change it from the system generated password.

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2.1.3 Retrieving a Lost Username

Overview

Should you forget your username, you can request a reminder which will be emailed to your registered account.

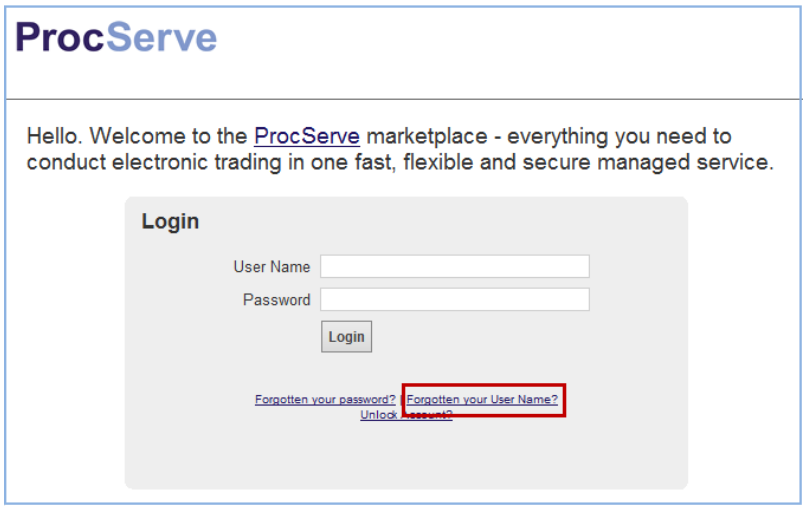
Retrieving a lost username

1. Navigate to the Procserve Commerce Hub URL:

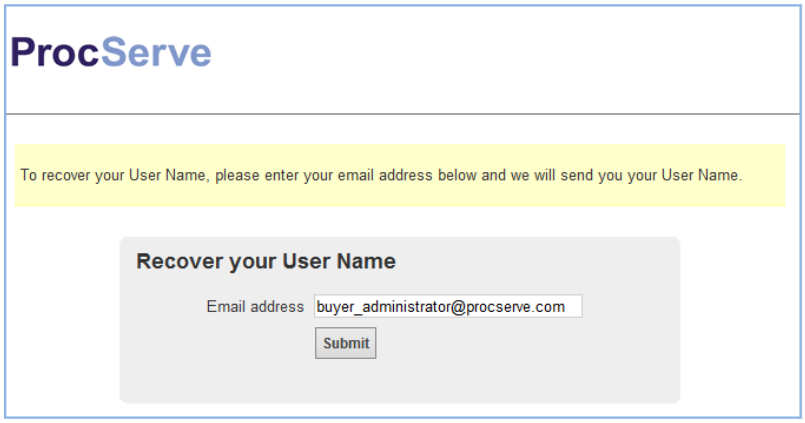
https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

You will be presented with the log in screen, at log in screen:

2. Click on the 'Forgotten your username?' link:


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name
Password
Login
Forgotten your password?
Forgotten your User Name?
Unlock Account?

3. Enter your email address:


ProcServe
To recover your User Name, please enter your email address below and we will send you your User Name.
Recover your User Name
Email address
buyer_administrator@procserve.com
Submit

© Procserve Holdings Limited 2012

4. Click 'Submit'

Note: Your username will be sent to you via email as an example below:

Hello Buyer_

We received a request for your User Name to be resent to you. Please see below:

Your User Name is: buyer_administrator@strn011

Using this and your Password you can now log in to the eMarketplace at:

https://saturn-buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB

The first time you use this password you will be asked to change it to something more memorable for you.

It is recommended that instead of typing the User Name try copying and pasting it into the login screen using the following steps:
1. Highlight the User Name making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the User Name field of the login screen right click again and select 'Paste'

If you did not request a User Name reminder, please contact the Zanzibar Service Desk via zanzibarhelpdesk@procserve.com

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2.1.4 Navigating Around Procserve Commerce Hub

Overview

When you first log in to Procserve Commerce Hub you will land on the homepage. Below is a brief description of where you need to navigate to in order to access the various features of Procserve Commerce Hub.

Note: The menu options and features that you have will depend on your organisation and the role that you have been given.

The Hompage

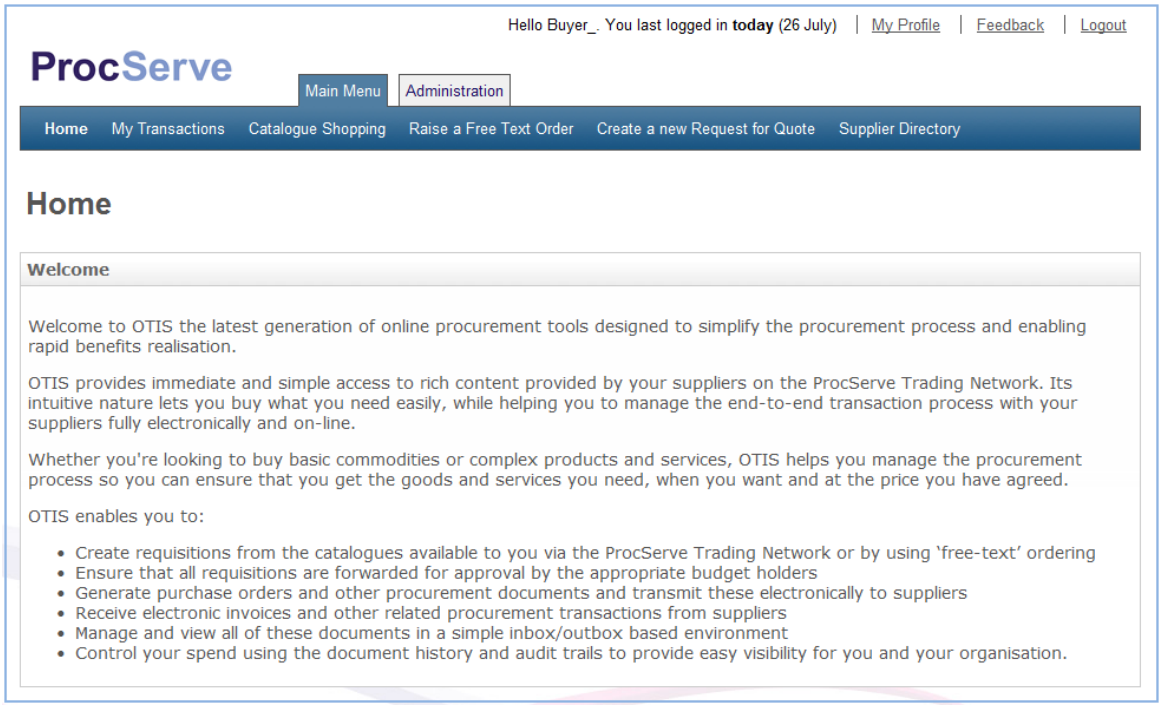
1] Header - from here you can change your profile and password, give feedback on Procserve Commerce Hub and log out of Procserve Commerce Hub.

2] Menu tabs - the two options are 'Main Menu' and 'Administration'. These are described later in this section.

3] Menu options - once selected you can view a variety of other menus which are described later in this section.

4] Menu body - the detail of the area where you can complete your required task.

5] Footer details - Procserve privacy and accessibility details as well as some useful contact information of the Procserve Commerce Hub administrators.


Hello Buyer_. You last logged in today (26 July) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using 'free-text' ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers
Receive electronic invoices and other related procurement transactions from suppliers
Manage and view all of these documents in a simple inbox/outbox based environment
Control your spend using the document history and audit trails to provide easy visibility for you and your organisation.

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Main Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Home - shows the homepage and any news feeds

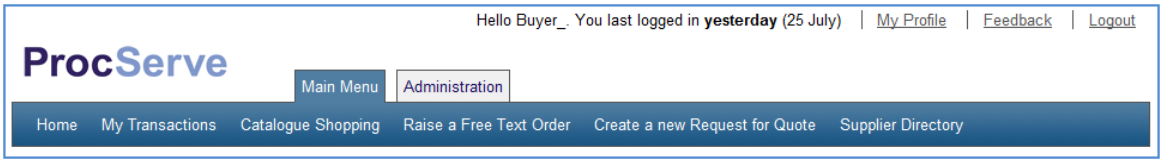
2] My Transactions - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

3] Catalogue Shopping - You can access the marketplace and shop for catalogue items.

4] Create a new Free Text Order - You can shop for non catalogue items. This tool provides a method to keep all transactions within Procserve Commerce Hub.

5] Create a new Request for Quote (RFQ) - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

6] Supplier Directory - Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.



Administration Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Community Management - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

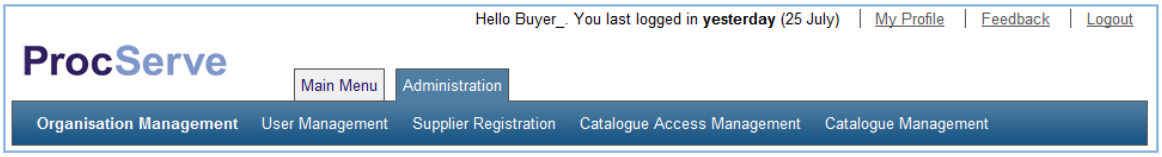
2] Organisation Management - You can view and edit the the general address details of your organisation in 'Organisation Management'.

3] User Management - You can add, edit and deactivate users within your organisation in 'User Management'

4] Supplier Registration - You can manage your supplier adoption in 'Supplier Registration'

5] Catalogue Access Management - You can determine which organisations and users can see what content in 'Catalogue Access Management'

6] Catalogue Management - You can upload and manage your catalogue content in 'Catalogue Management'



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2.1.5 My Profile

Overview

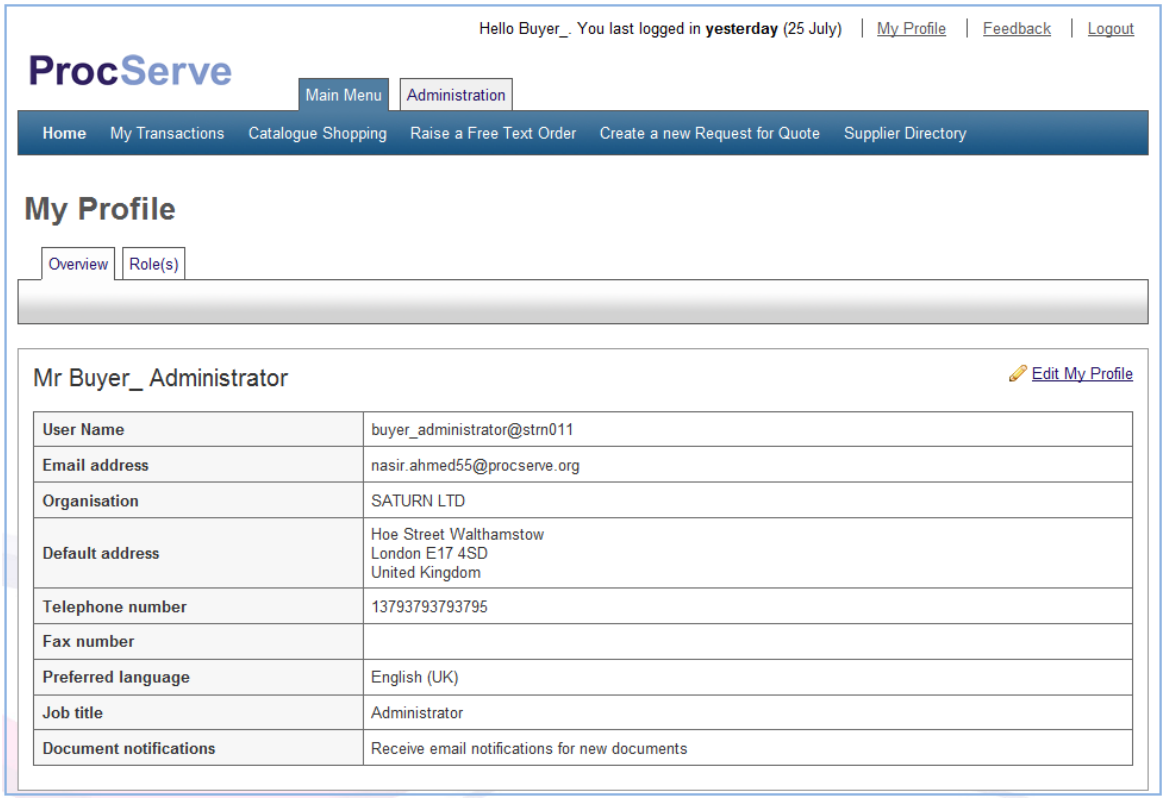
Within the My Profile you can edit your general details and view the roles that you have. You can also view the organisations that you belong to and switch to these organisations to administer and view their configuration.

Note: Dependant on the roles you have been given you may not be able to see all functions in the below screenshots.

Viewing My Profile

1. Click on 'My Profile' from any page within Procserve Commerce Hub

You will be taken to the overview page where you can view and edit your basic details.



You can view any of the tabs and the details within them by clicking on the tab. By clicking on the 'Roles' tab you can view the roles that you have been given.

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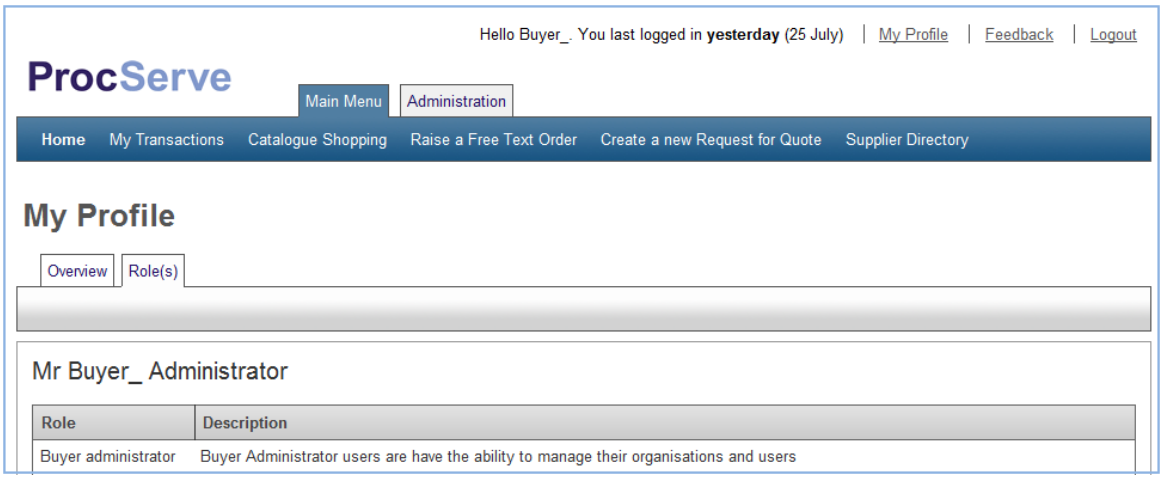
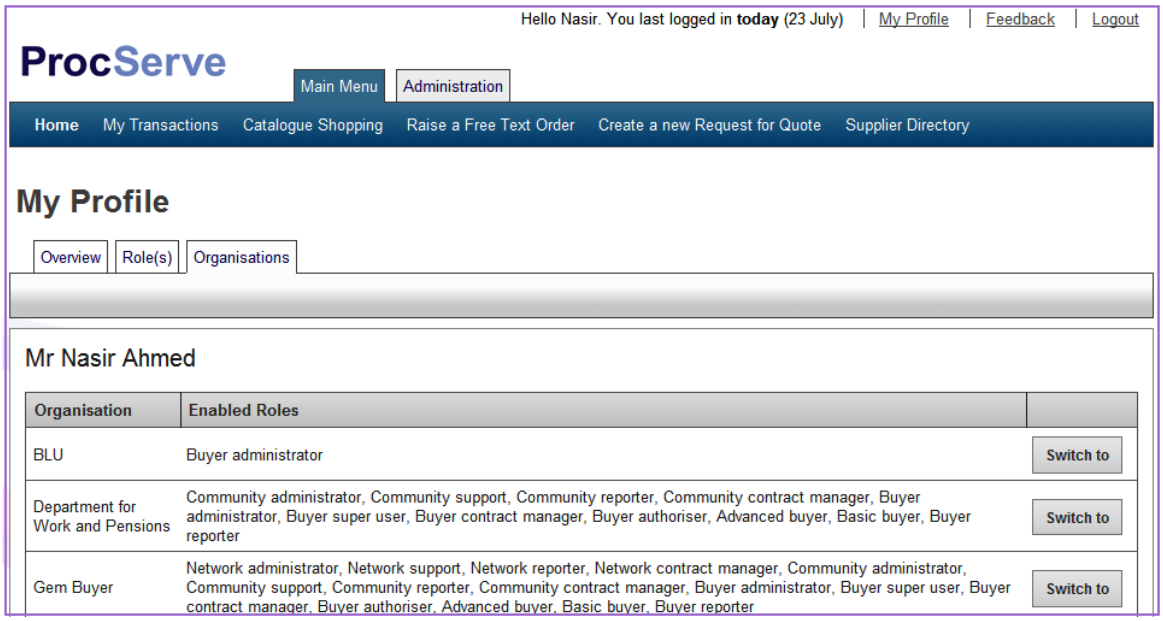


By clicking on 'Organisations' you can view the organisations you have against your profile and switch to administer and troubleshoot as required.


Hello Nasir. You last logged in today (23 July) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
My Profile
Overview
Role(s)
Organisations
Mr Nasir Ahmed
Organisation
Enabled Roles
BLU
Buyer administrator
Switch to
Department for Work and Pensions
Community administrator, Community support, Community reporter, Community contract manager, Buyer administrator, Buyer super user, Buyer contract manager, Buyer authoriser, Advanced buyer, Basic buyer, Buyer reporter
Switch to
Gem Buyer
Network administrator, Network support, Network reporter, Network contract manager, Community administrator, Community support, Community reporter, Community contract manager, Buyer administrator, Buyer super user, Buyer contract manager, Buyer authoriser, Advanced buyer, Basic buyer, Buyer reporter
Switch to

For more information on switching see 'Switching Organisations'.

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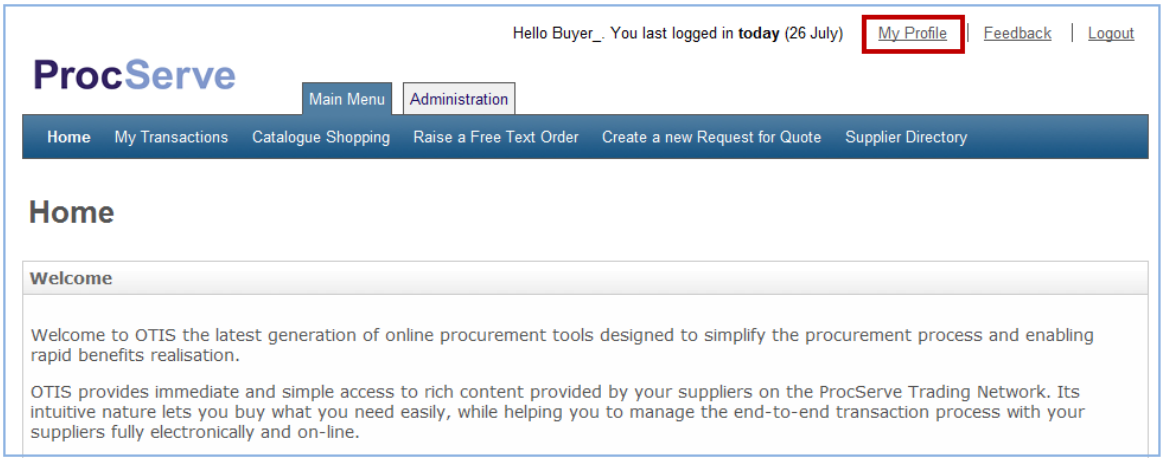
2.1.5.1 Editing My Profile

Overview

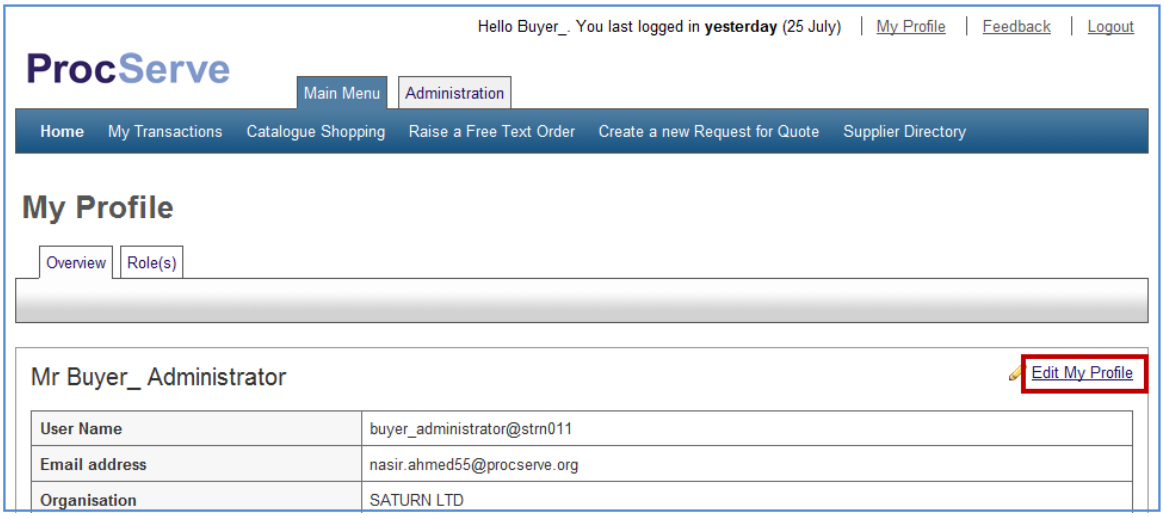
You can update your basic details on your profile.

Editing my profile

1. Click on 'My Profile' from any page within Procserve Commerce Hub


Hello Buyer_. You last logged in today (26 July)
My Profile
Feedback
Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.

2. Click on 'Edit My Profile'



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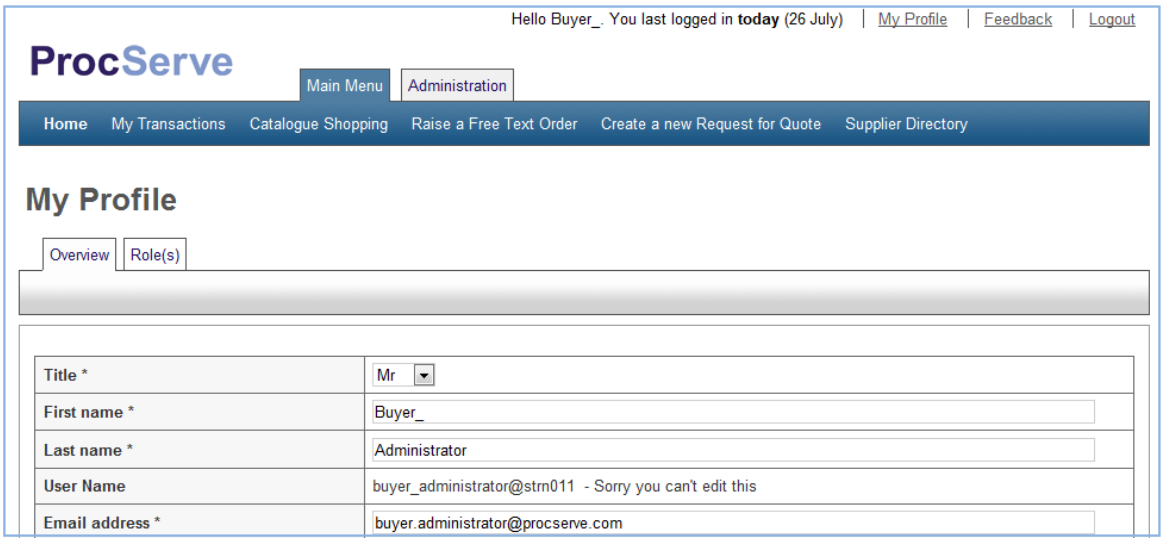
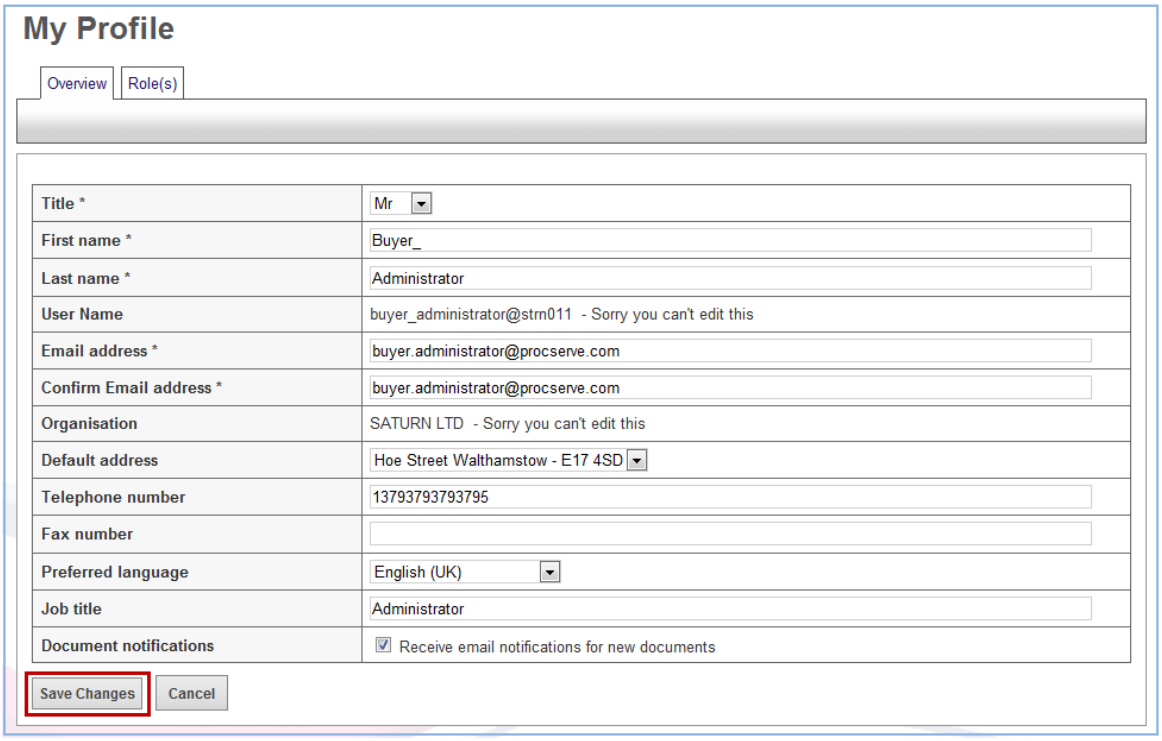
3. Edit the features you wish to change



4. Once complete, click 'Save Changes'



Note: If you wish to cancel your changes, click 'Cancel'

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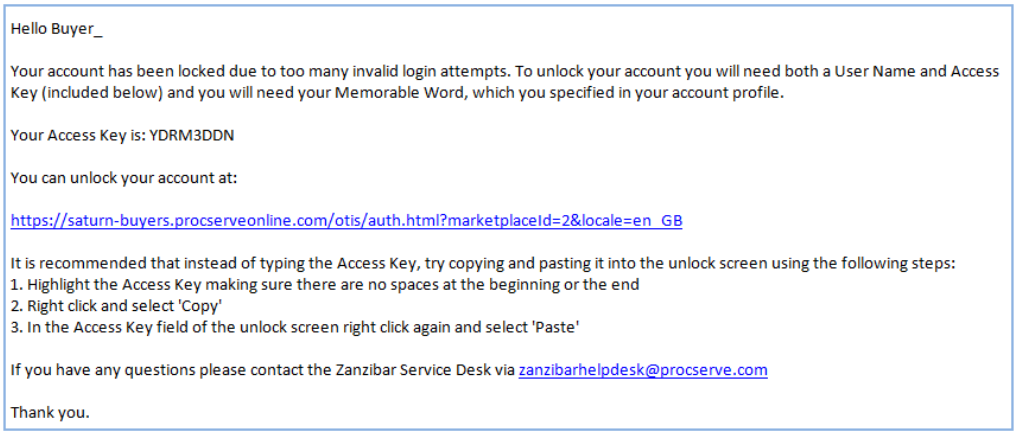
2.1.6 Unlocking your Account

Overview

Your account will be locked if you enter your log in details incorrectly 3 or more times. You will be informed that your account has been locked via an email. You can unlock your own account using your memorable word and the access code contained in the email.

Unlocking your account

1. You will receive an email informing you your account has been locked. Within the email are the details you require to unlock your account:



Hello Buyer_

Your account has been locked due to too many invalid login attempts. To unlock your account you will need both a User Name and Access Key (included below) and you will need your Memorable Word, which you specified in your account profile.

Your Access Key is: YDRM3DDN

You can unlock your account at:

https://saturn-buyers.procserveonline.com/otis/auth.html?marketplaceId=2&locale=en_GB

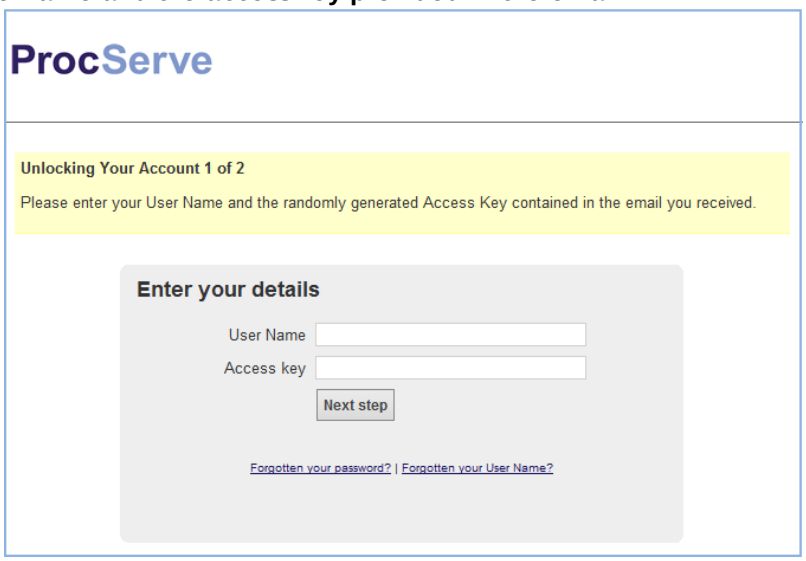
It is recommended that instead of typing the Access Key, try copying and pasting it into the unlock screen using the following steps:
1. Highlight the Access Key making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the Access Key field of the unlock screen right click again and select 'Paste'

If you have any questions please contact the Zanzibar Service Desk via zanzibarhelpdesk@procserve.com

Thank you.

2. Navigate to the url within the email or use the 'Unlock account?' on the login page:

3. Enter your username and the access key provided in the email:


ProcServe
Unlocking Your Account 1 of 2
Please enter your User Name and the randomly generated Access Key contained in the email you received.
Enter your details
User Name
Access key
Next step
Forgotten your password? | Forgotten your User Name?

4. Enter the memorable word. You hint will be displayed in the instructions window:

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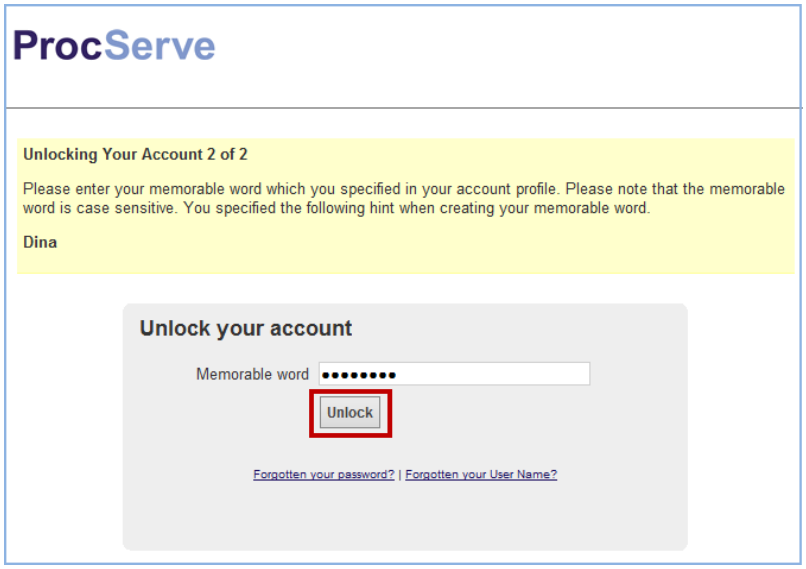
ProcServe
Unlocking Your Account 2 of 2
Please enter your memorable word which you specified in your account profile. Please note that the memorable word is case sensitive. You specified the following hint when creating your memorable word.
Dina
Unlock your account
Memorable word
Unlock
Forgotten your password? | Forgotten your User Name?

5. Your account is unlocked. If you do not remember your password you can request a new one which will be emailed to you.

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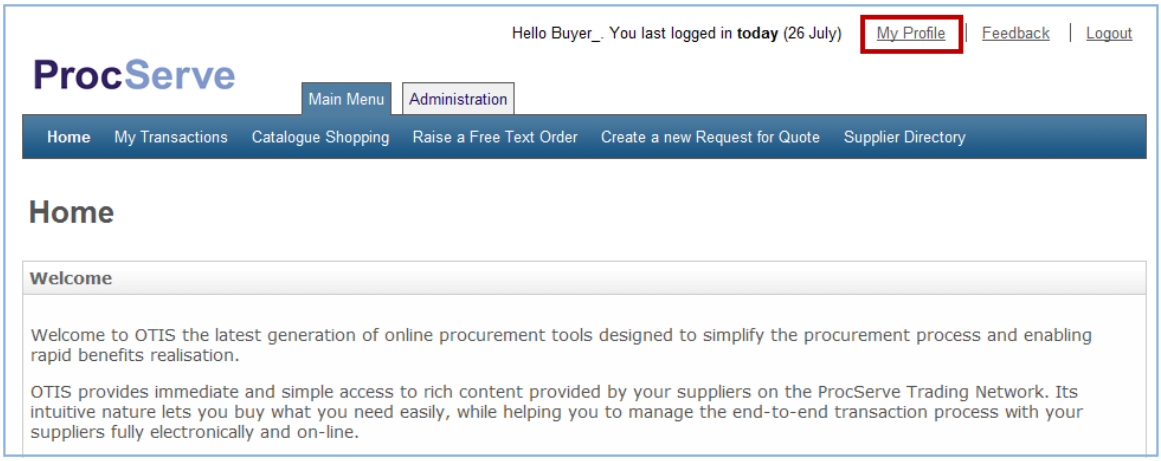
2.1.7 Changing My Password

Overview

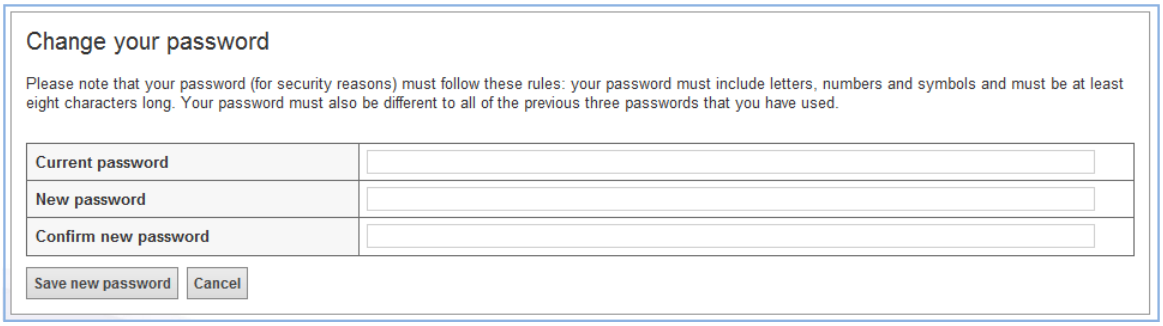
You can change your password at any time within 'My Profile'

Changing my password

1. Click on 'My Profile' from any page within Procserve Commerce Hub


Hello Buyer_. You last logged in today (26 July)
My Profile
Feedback
Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.

2. On the overview screen, scroll down to the 'Change your password' area


Change your password
Please note that your password (for security reasons) must follow these rules: your password must include letters, numbers and symbols and must be at least eight characters long. Your password must also be different to all of the previous three passwords that you have used.
Current password
New password
Confirm new password
Save new password
Cancel

3. Enter your old password and what you wish to change it to.

Note: Be aware of the password restrictions within your marketplace that are narrated above the password change fields

4. Click 'Save new password' to save the changes

Note: You can cancel the changes by clicking the 'Cancel' button.

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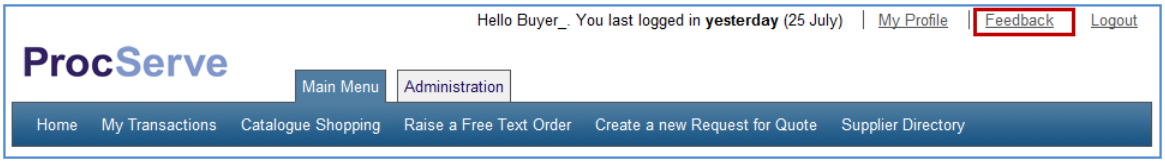
2.1.8 Giving Feedback on Procserve Commerce Hub

Overview

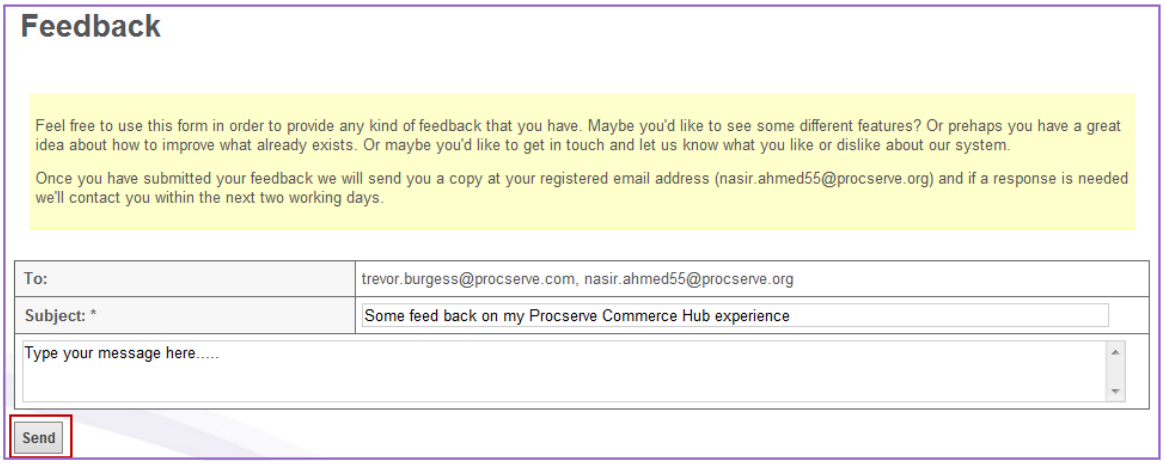
You can use the feedback section to provide Procserve with feedback on the system.

Providing feedback

1.From any screen within Procserve Commerce Hub click 'Feedback':

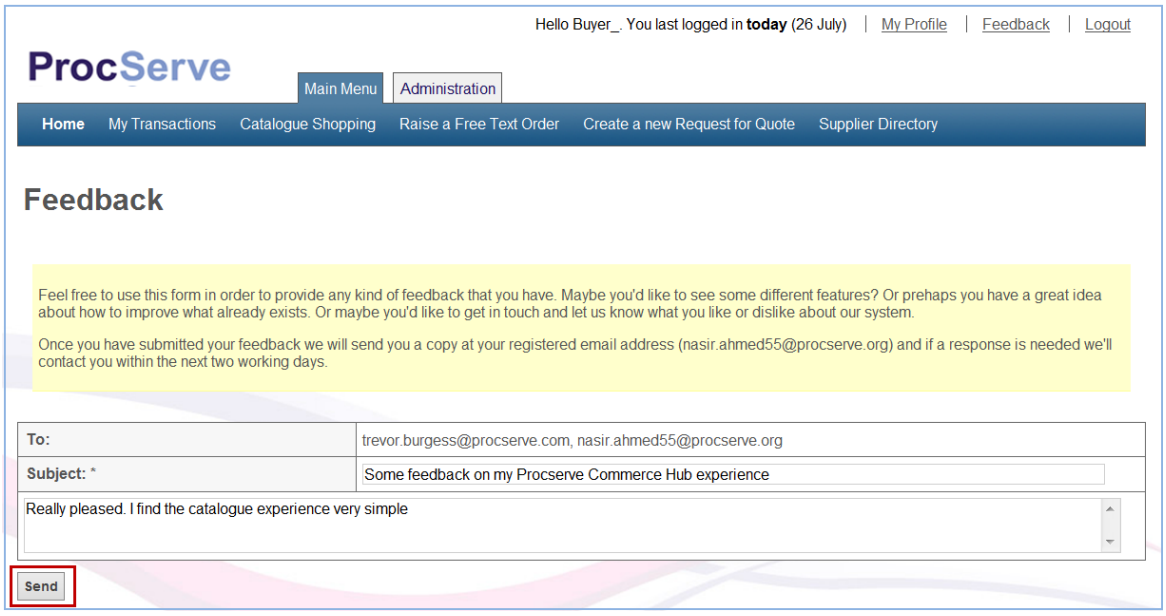


2. Enter your feedback notes and subject in the box provided:


Feedback
Feel free to use this form in order to provide any kind of feedback that you have. Maybe you'd like to see some different features? Or prehaps you have a great idea about how to improve what already exists. Or maybe you'd like to get in touch and let us know what you like or dislike about our system.
Once you have submitted your feedback we will send you a copy at your registered email address (nasir.ahmed55@procserve.org) and if a response is needed we'll contact you within the next two working days.
To:
trevor.burgess@procserve.com, nasir.ahmed55@procserve.org
Subject: *
Some feed back on my Procserve Commerce Hub experience
Type your message here.....
Send

3. Click 'Send'

Your message has now been sent to the system administrators.


Hello Buyer_. You last logged in today (26 July)
My Profile
Feedback
Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Feedback
Feel free to use this form in order to provide any kind of feedback that you have. Maybe you'd like to see some different features? Or prehaps you have a great idea about how to improve what already exists. Or maybe you'd like to get in touch and let us know what you like or dislike about our system.
Once you have submitted your feedback we will send you a copy at your registered email address (nasir.ahmed55@procserve.org) and if a response is needed we'll contact you within the next two working days.
To:
trevor.burgess@procserve.com, nasir.ahmed55@procserve.org
Subject: *
Some feedback on my Procserve Commerce Hub experience
Really pleased. I find the catalogue experience very simple
Send

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2.2 Procserve Commerce Hub Administration

2.2.1 Overview

Administration Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Community Management - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

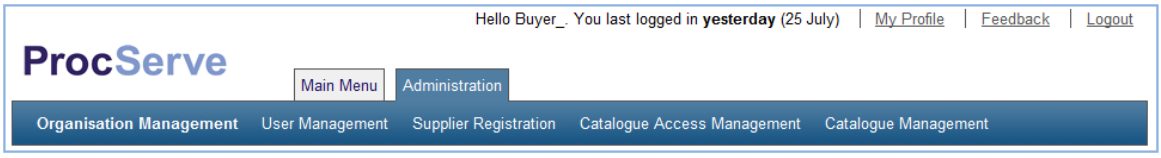
2] Organisation Management - You can view and edit the the general address details of your organisation in 'Organisation Management'.

3] User Management - You can add, edit and deactivate users within your organisation in 'User Management'

4] Supplier Registration - You can manage your supplier adoption in 'Supplier Registration'

5] Catalogue Access Management - You can determine which organisations and users can see what content in 'Catalogue Access Management'

6] Catalogue Management - You can upload and manage your catalogue content in 'Catalogue Management'



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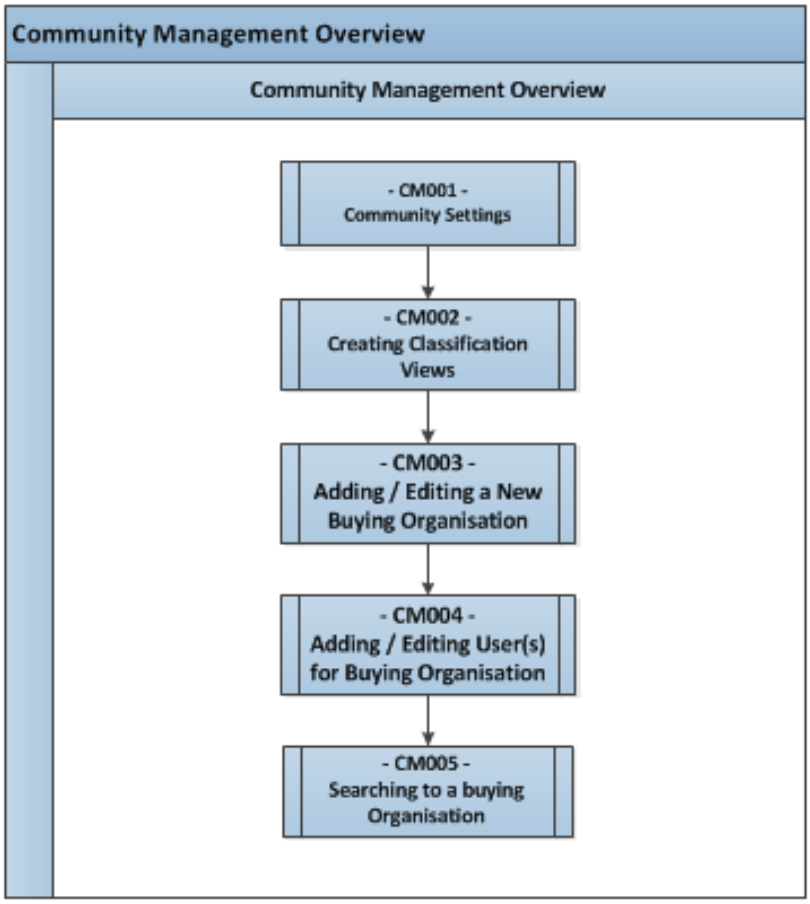
2.2.2 Community Management

2.2.2.1 Introduction to Managing My Community

Overview

Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views. This section highlights how you can manage your community.



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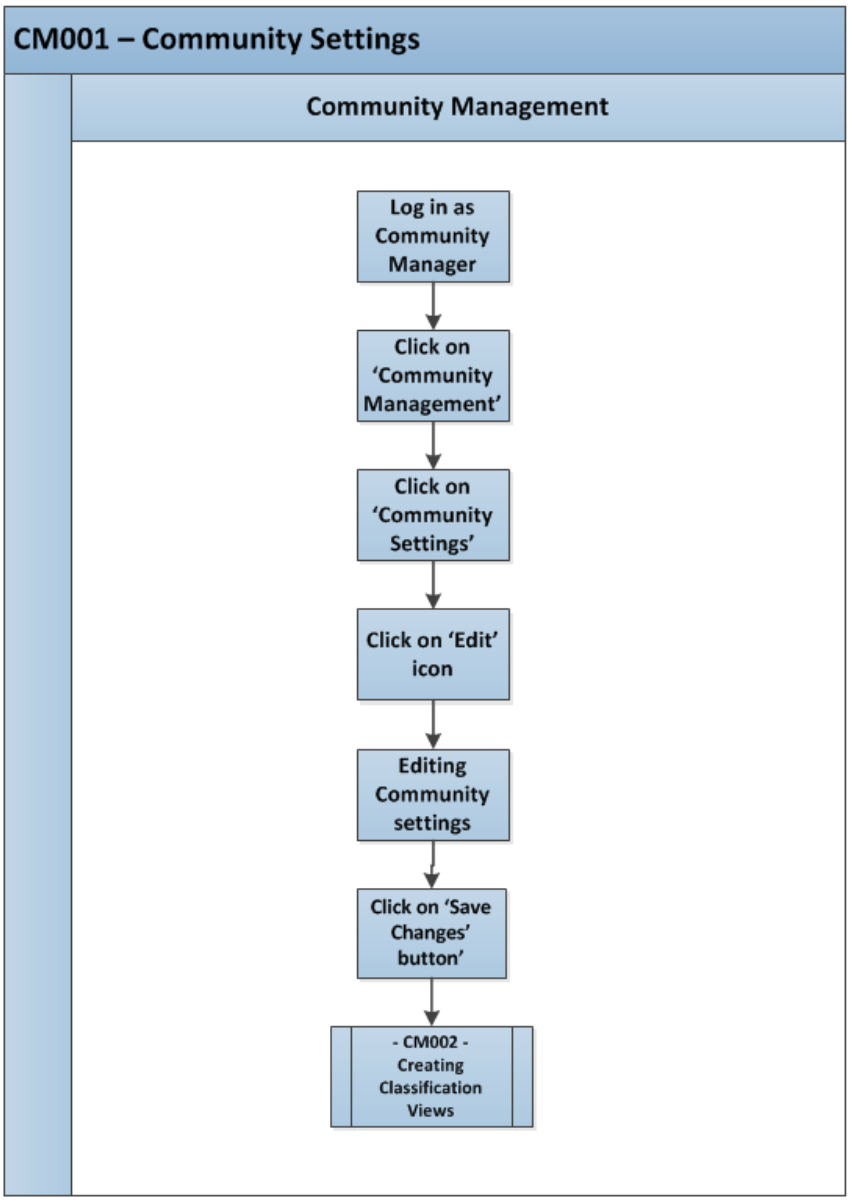
2.2.2.2 Community Administration

2.2.2.2.1 Administering Community Helpdesk Details

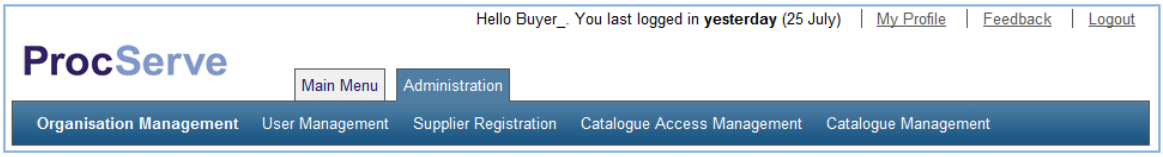
Overview

Within Community Settings you can change the contact details for the communities helpdesk.


CM001 – Community Settings
Community Management
Log in as Community Manager
Click on 'Community Management'
Click on 'Community Settings'
Click on 'Edit' icon
Editing Community settings
Click on 'Save Changes' button'
- CM002 - Creating Classification Views

To edit your Community Details

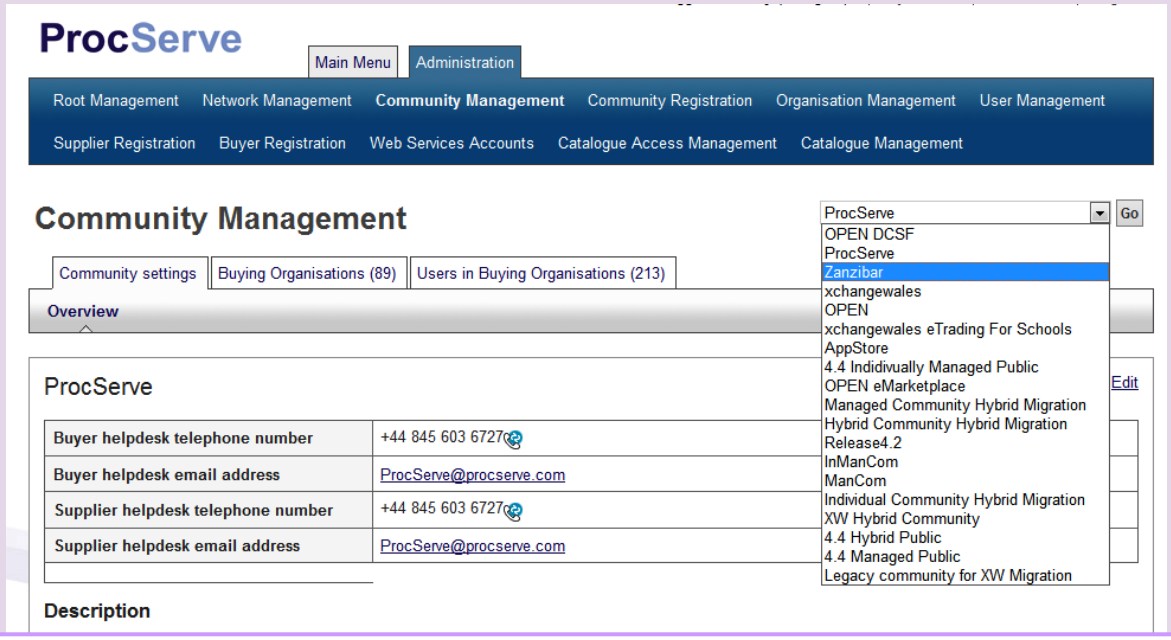
1. Click on the 'Administration' tab

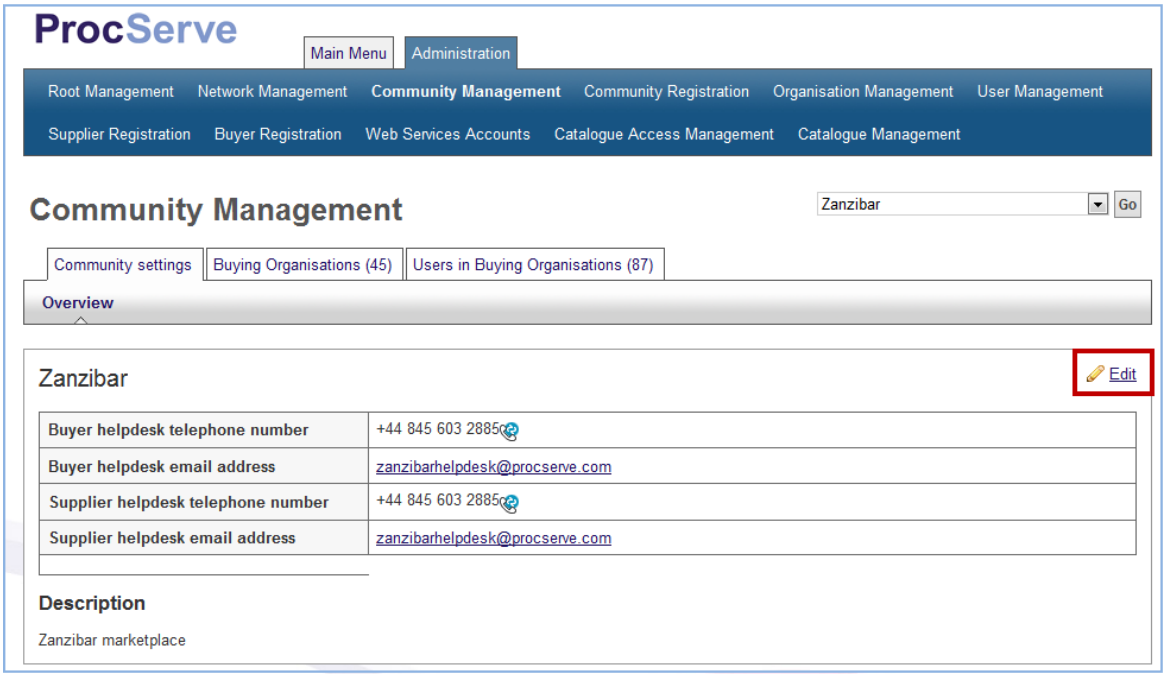


© Procserve Holdings Limited 2012

2. Click on the 'Community Management' tab and then 'Community Settings'

Tip! If you administer multiple communities you can change the drop down to the community you wish to work with.





3. Click on 'Edit these settings'

You can now edit the community settings.

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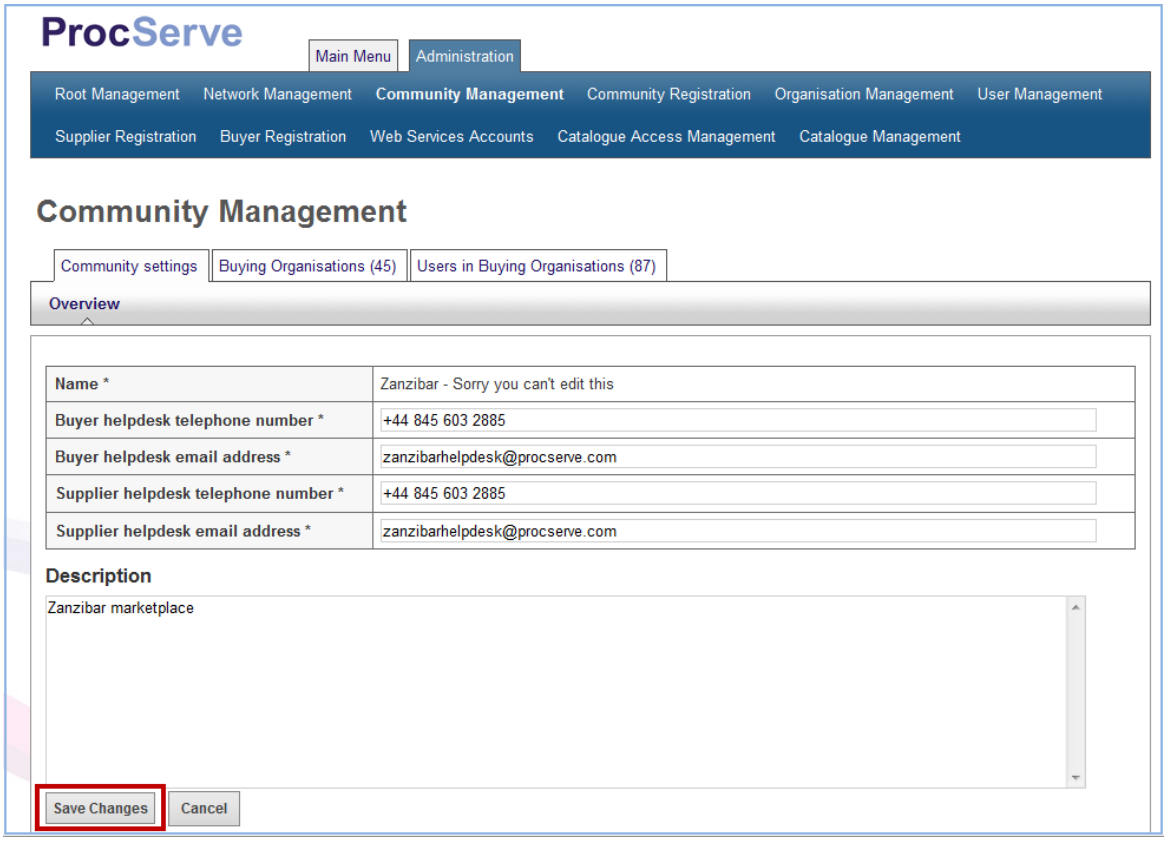

Note: You may not be able to edit some of the fields dependent on your Community set up

4. When complete click 'Save changes'

Note: You can cancel any changes by clicking the 'Cancel' button.

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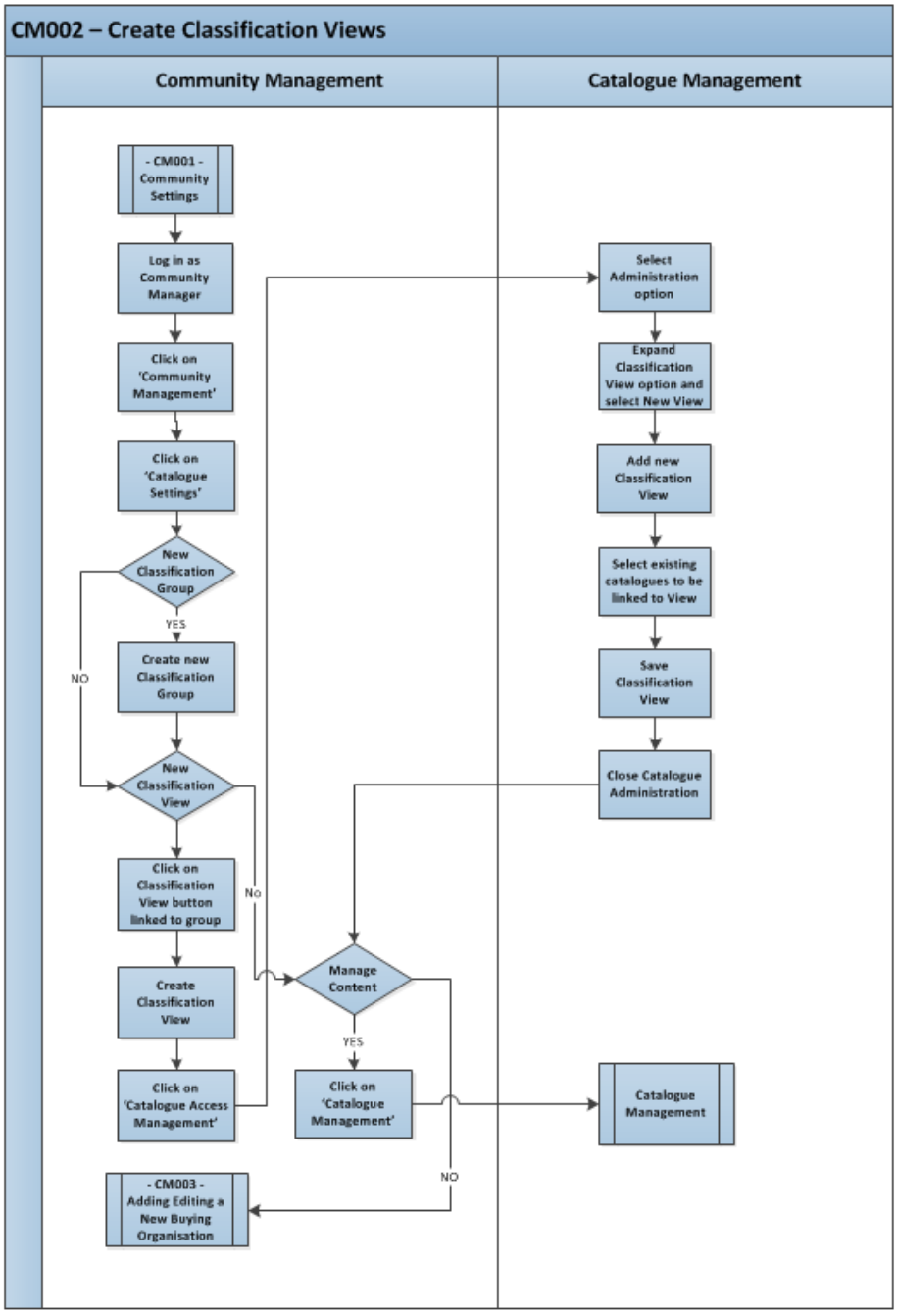
2.2.2.2.2 Community Classification View

Overview

This section describes how to create and manage classification views. Classification views need creating in the marketplace and in Procserve Commerce Hub.

Classification views are created to allow a buyer to see only selected UNSPSC classifications and or supplier catalogues. Classification views are then added to a user or user group profile.



For more information on classification views and administering them within the system view the **'Managing Classification Views'** section.

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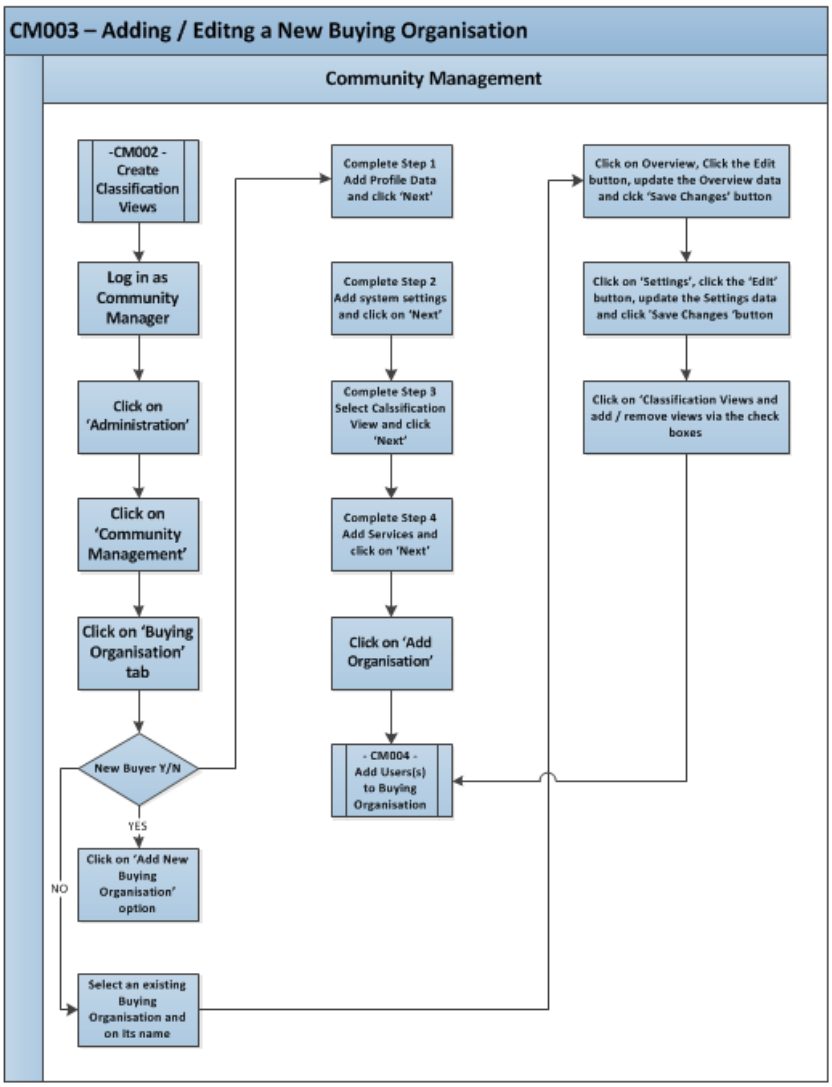
2.2.2.2.3 Adding Buying Organisations and Users

2.2.2.2.3.1 Adding a New Buying Organisation

Overview

This section describes how you can add a new buying organisation.


CM003 – Adding / Editng a New Buying Organisation
Community Management
-CM002 - Create Classification Views
Log in as Community Manager
Click on 'Administration'
Click on 'Community Management'
Click on 'Buying Organisation' tab
New Buyer Y/N
YES
NO
Click on 'Add New Buying Organisation' option
Select an existing Buying Organisation and on its name
Complete Step 1 Add Profile Data and click 'Next'
Complete Step 2 Add system settings and click on 'Next'
Complete Step 3 Select Calssification View and click 'Next'
Complete Step 4 Add Services and click on 'Next'
Click on 'Add Organisation'
- CM004 - Add Users(s) to Buying Organisation
Click on Overview, Click the Edit button, update the Overview data and click 'Save Changes' button
Click on 'Settings', click the 'Edit' button, update the Settings data and click 'Save Changes 'button
Click on 'Classification Views and add / remove views via the check boxes

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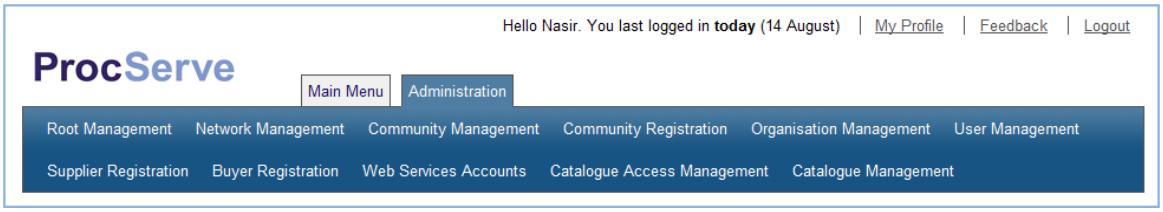
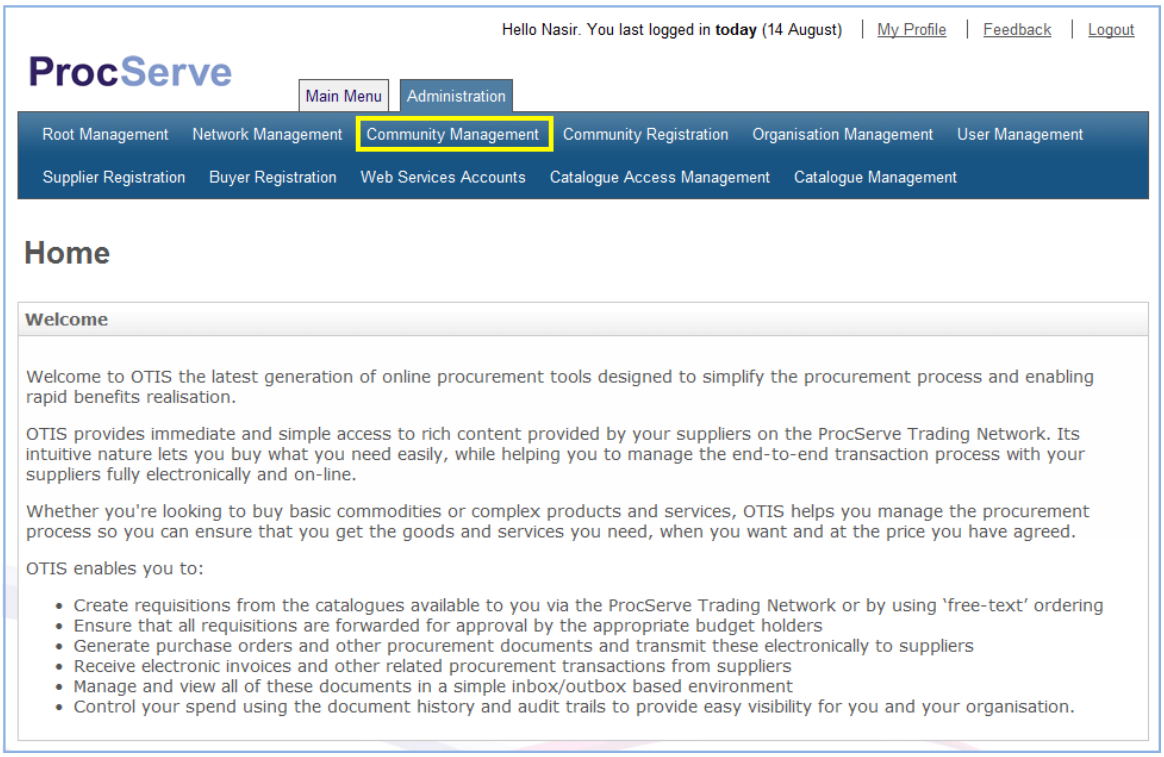
Adding a new organisation to a community

1. Log in to Procserve Commerce Hub.

2. Click on 'Administration'



3. Click on 'Community Management'


Hello Nasir. You last logged in today (14 August) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Root Management
Network Management
Community Management
Community Registration
Organisation Management
User Management
Supplier Registration
Buyer Registration
Web Services Accounts
Catalogue Access Management
Catalogue Management
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using 'free-text' ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers
Receive electronic invoices and other related procurement transactions from suppliers
Manage and view all of these documents in a simple inbox/outbox based environment
Control your spend using the document history and audit trails to provide easy visibility for you and your organisation.

4. Click on the 'Buying Organisations' tab

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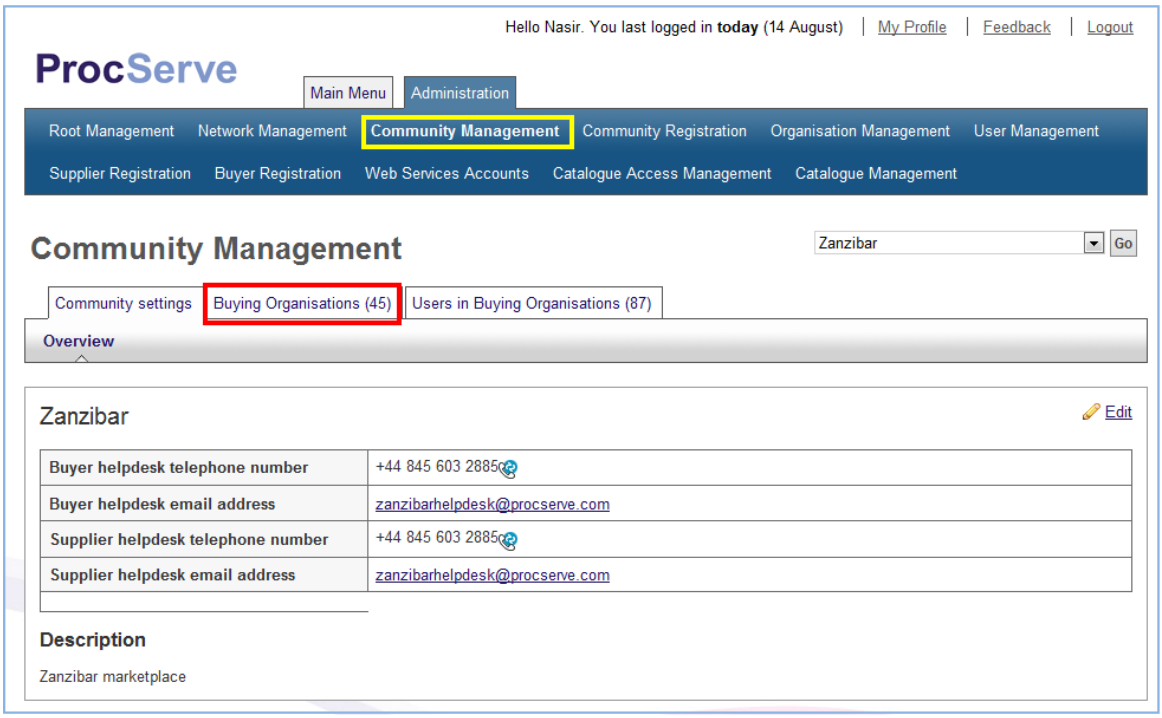
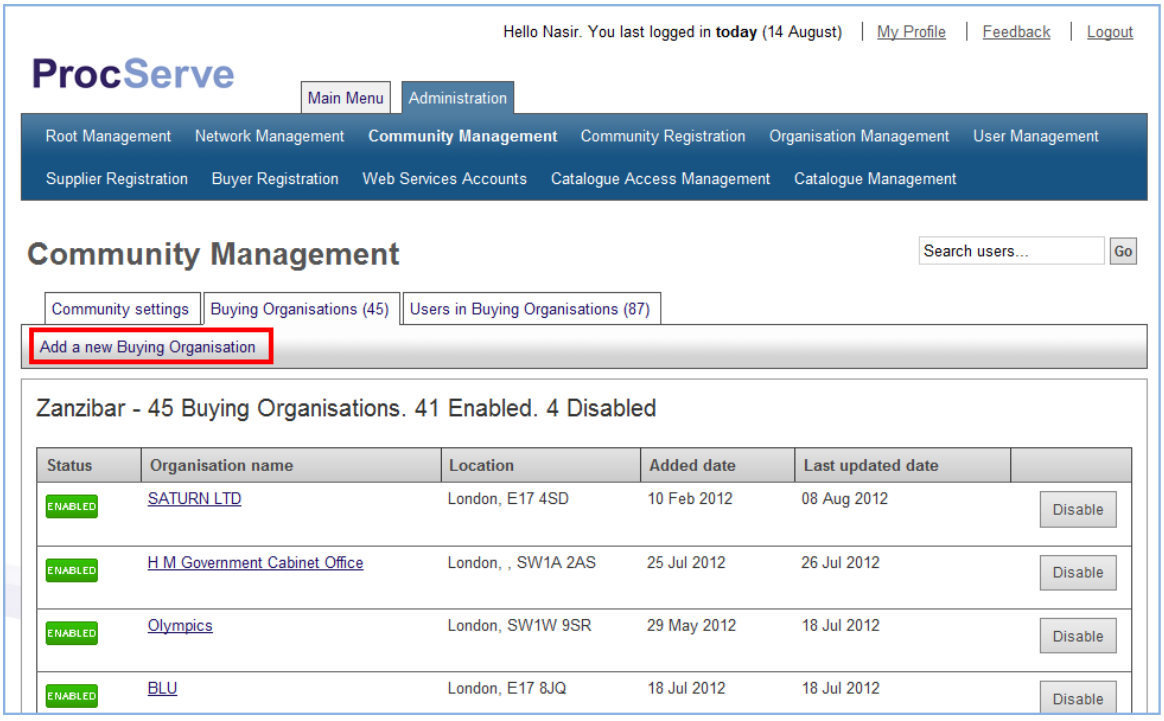


From here you can see all the existing buying organisations in the community.

5. Click 'Add a new buying organisation'



6. Complete the web form details

Note: Fields marked with an * are mandatory.

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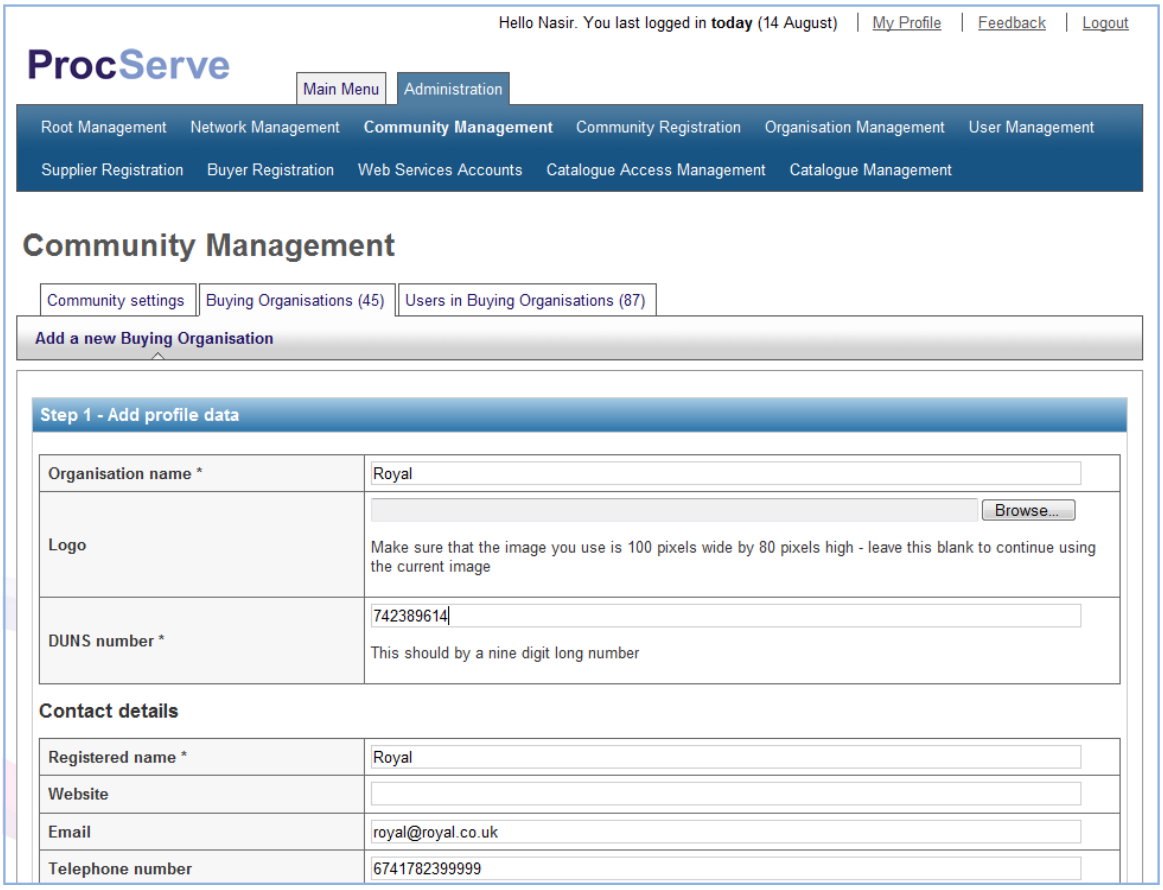
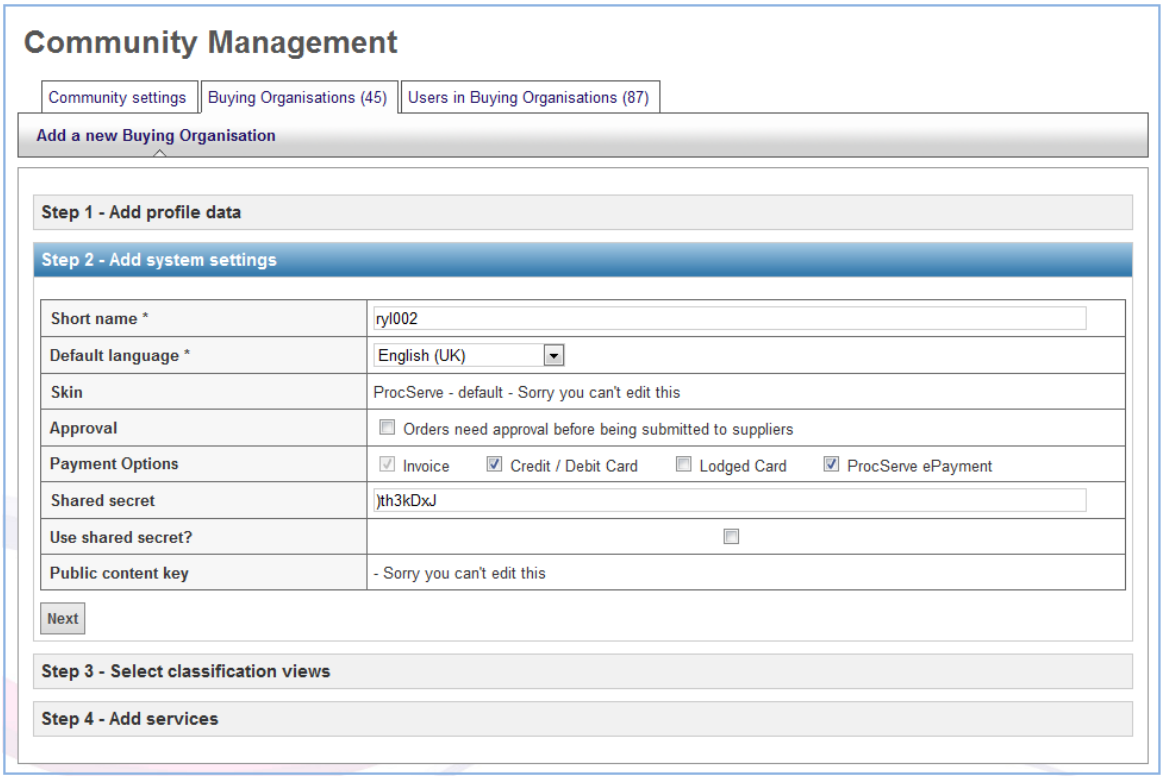


7. When complete click 'Next Step'



Note: The approval box determines whether for this organisation the order requires approval before being

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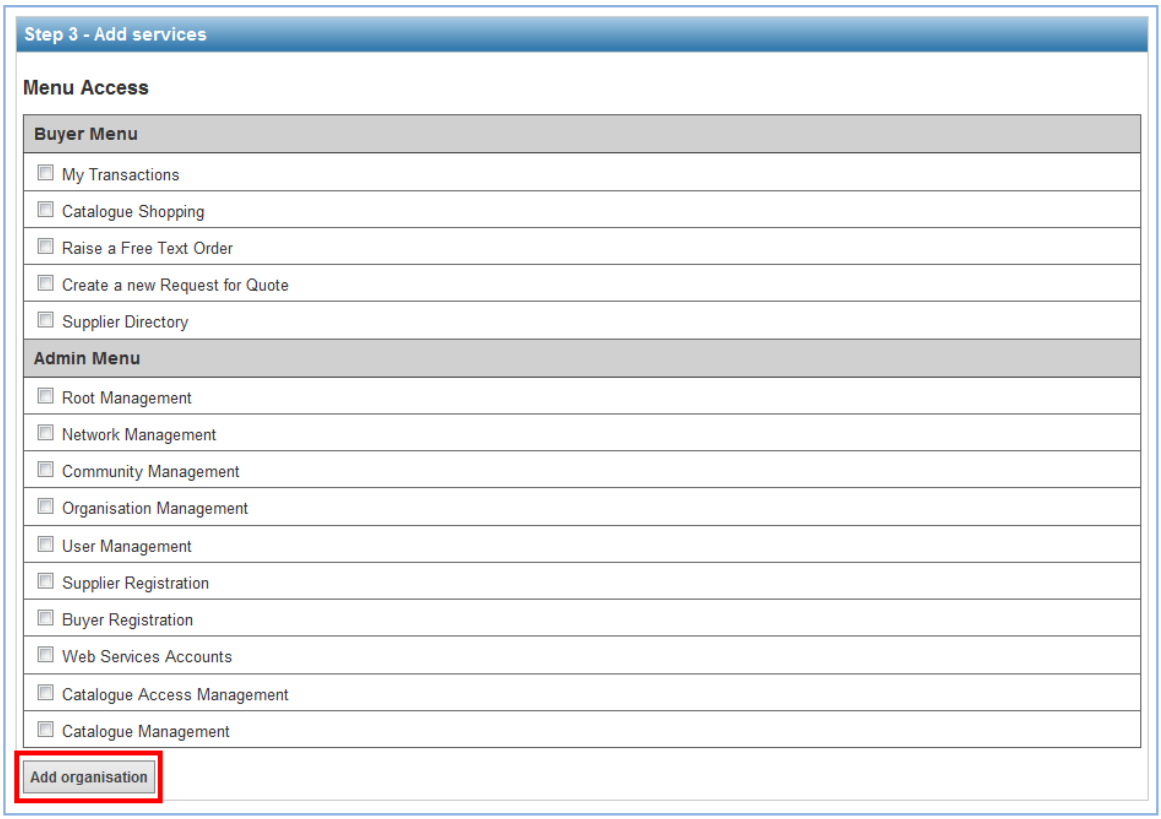
transmitted to the supplier.

8. Click 'Next' when satisfied with the settings

Note: Dependent on your community settings - you may have to select the classification views for the organisation as this stage.

9. Add the services the organisation will be able to see and do. The organisation will only be able to see the menus that you enable here.



10. Click 'Add organisation' when complete

You will get a success message.

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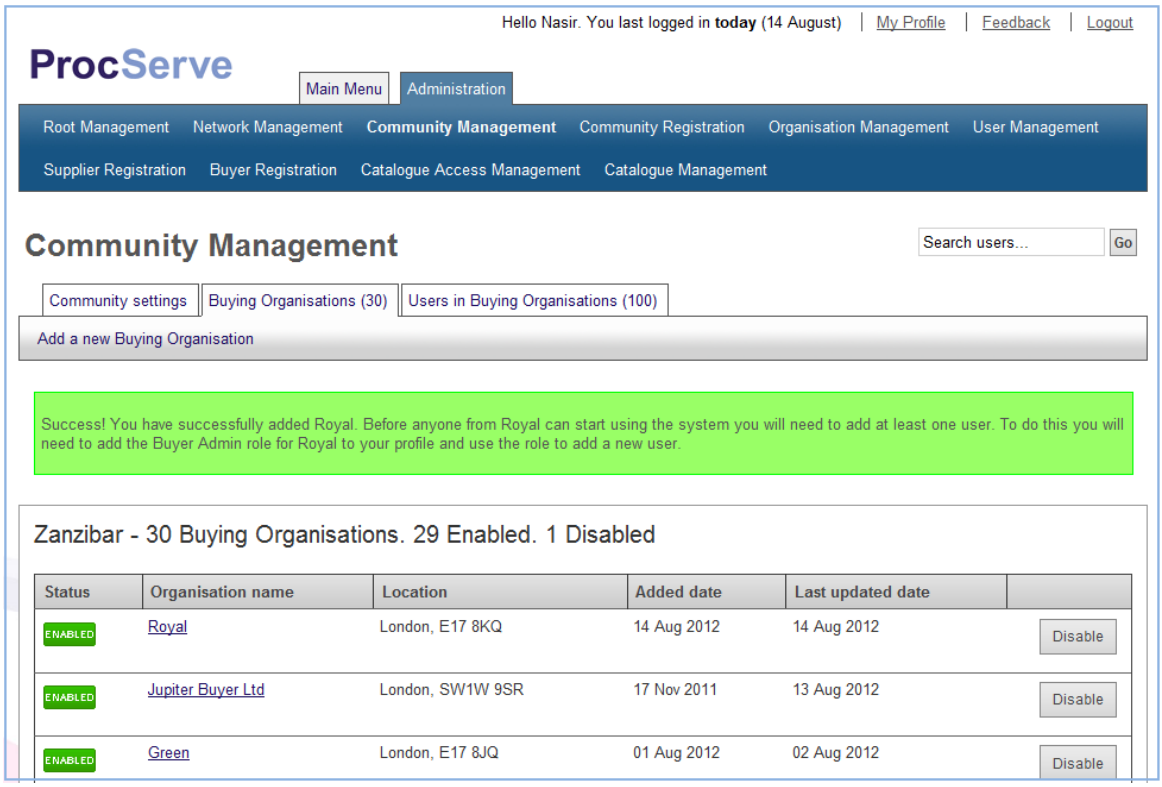

11. You then need to add your first user to the organisation which is highlighted in the next section.

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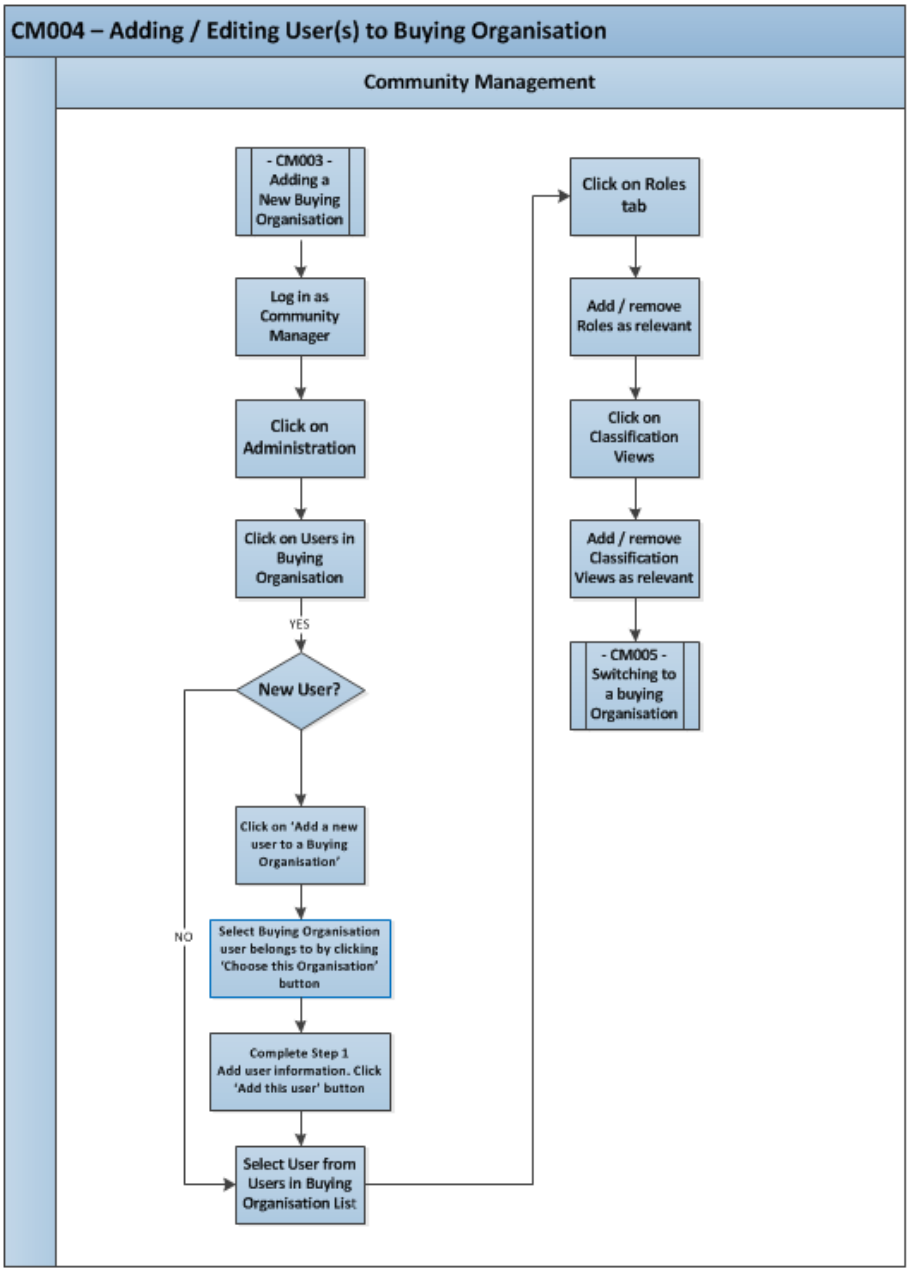
2.2.2.2.3.2 Adding a New User

Overview

This section describes how you can add a new user to an new or existing organisation.


CM004 – Adding / Editing User(s) to Buying Organisation
Community Management
- CM003 - Adding a New Buying Organisation
Log in as Community Manager
Click on Administration
Click on Users in Buying Organisation
YES
New User?
NO
Click on 'Add a new user to a Buying Organisation'
Select Buying Organisation user belongs to by clicking 'Choose this Organisation' button
Complete Step 1 Add user information. Click 'Add this user' button
Select User from Users in Buying Organisation List
Click on Roles tab
Add / remove Roles as relevant
Click on Classification Views
Add / remove Classification Views as relevant
- CM005 - Switching to a buying Organisation

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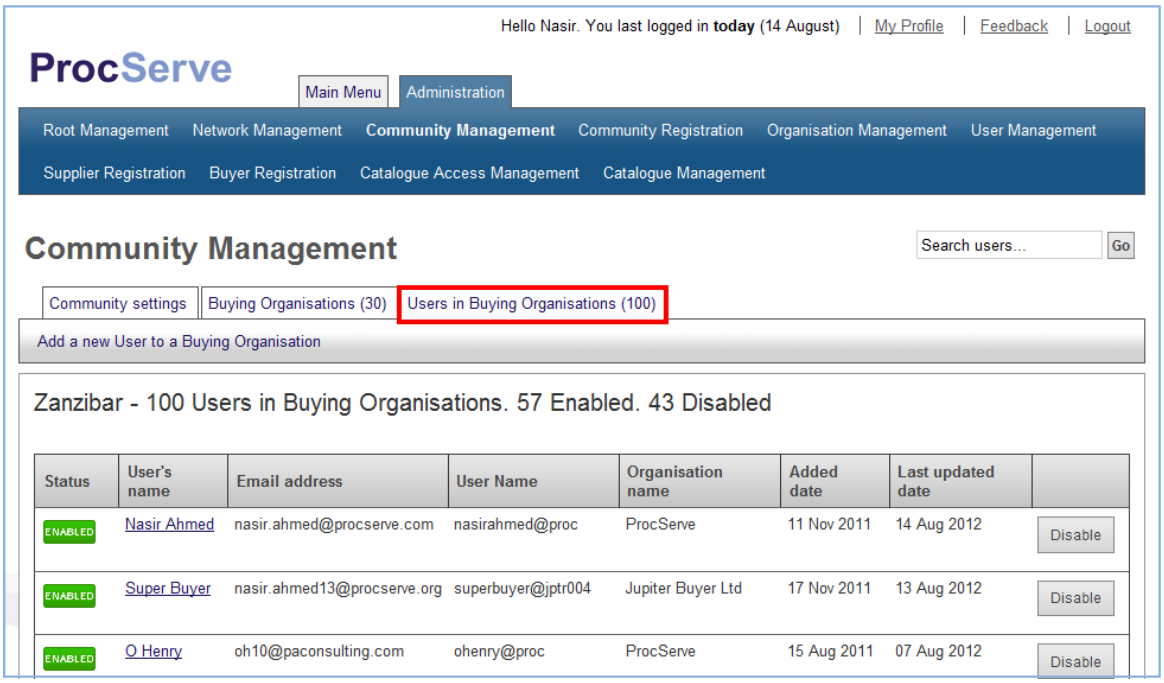
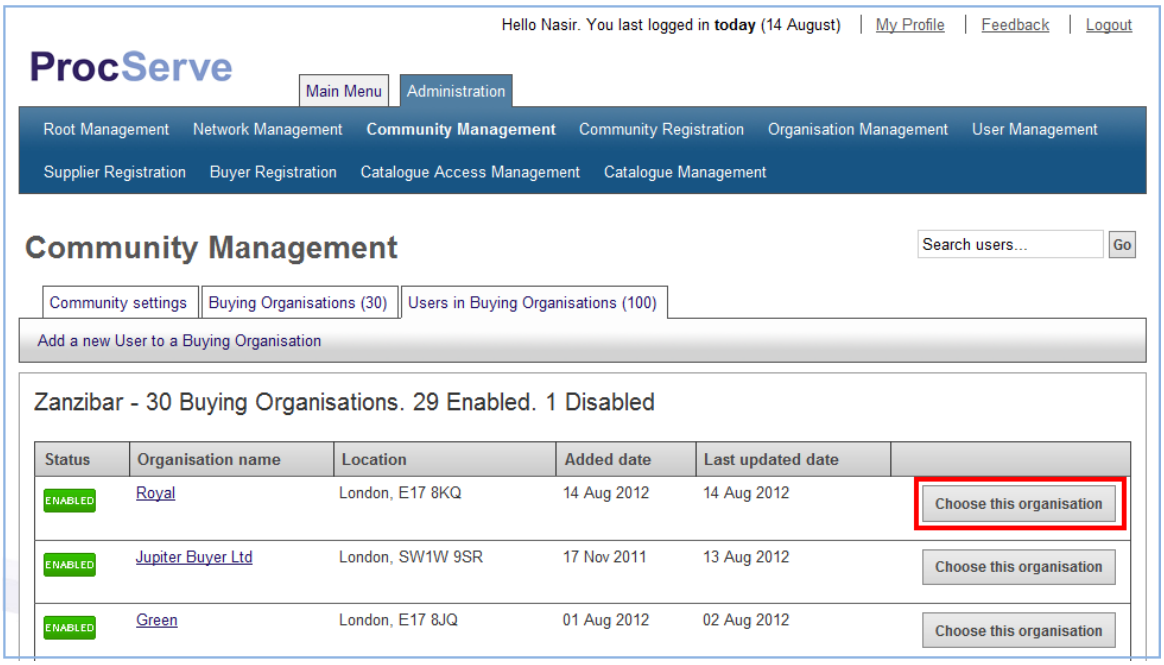
Adding a user

1. Click on 'Community Management' and then 'Users in Buying Organisations'



Tip! Click on the link of an existing user here to edit their details if required.

2. Click on 'Add a new User to a Buying Organisation'



3. Find the organisation you wish to add the user too and click 'Choose this organisation'

4. Complete the web form

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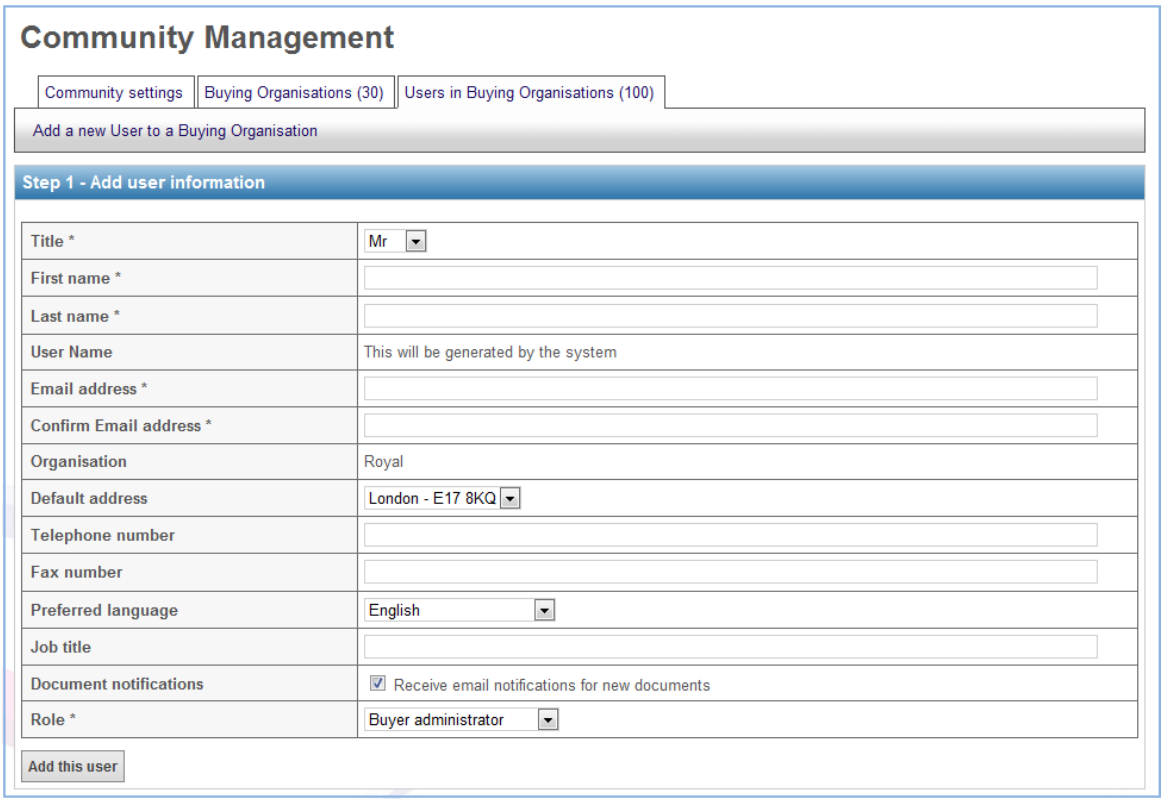
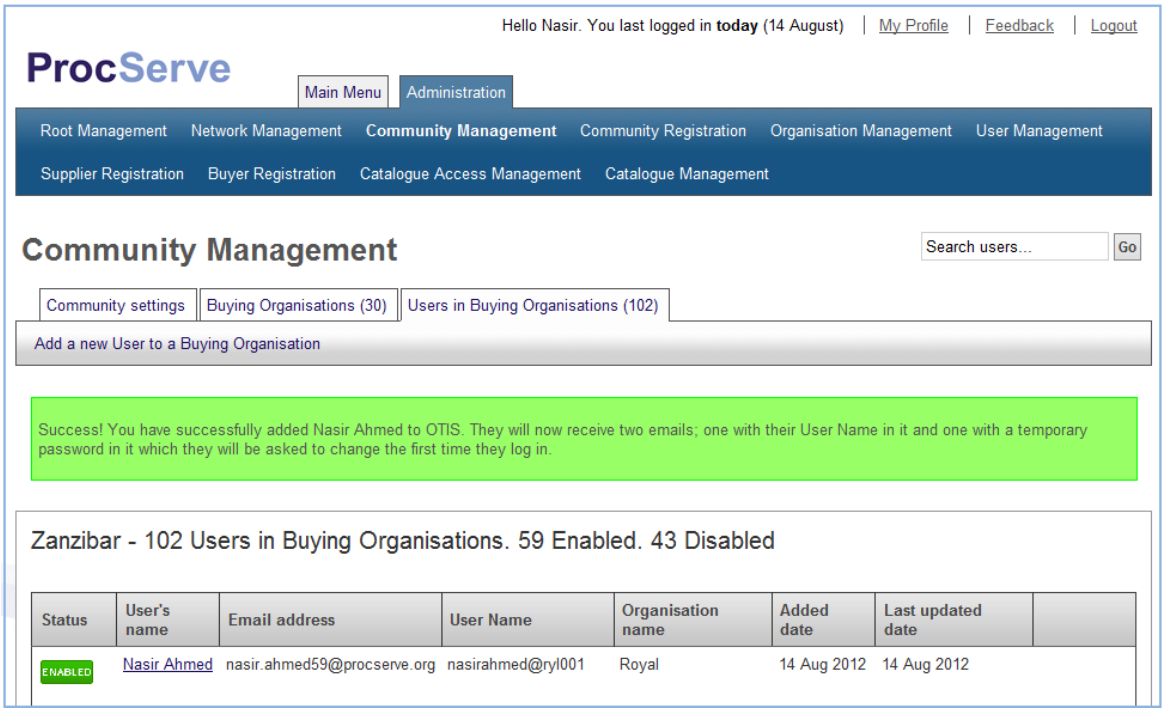


5. Click 'Add this user' when complete

You should get a success message.



6. You can now add classification views, so the user can shop using the marketplace, and add additional roles

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2.2.2.2.4 Community Administration Roles Matrix

When assigning roles to a community administrator, although other roles may be visible, only the following should be used.

Note: All users within the Community Admin organisation should be given the Buyer Contract Manager role.

Role Description	Community Administrator	Community Contract Manager	Buyer Contract Manager
My Transactions	▪	▪	▪
Document Tracker	▪	▪	▪
Supplier Directory	▪	▪	✓
Community Management	✓	▪	▪
** Add new buying org*	✓	▪	▪
** Disable orgs*	✓	▪	▪
** Edit other organisation details*	✓	✓^	✓^
*** Create users in other orgs*	✓	✓^	✓^
*** Edit other orgs Users*	✓	✓^	✓^
Add other orgs to other Comm Admin users	✓	▪	▪
Administer other org Catalogues	✓	✓^	✓^
Organisation Management	✓	▪	▪
User Management	✓	▪	▪
Create new users within org	✓	▪	▪
Edit existing user within org	✓	▪	▪
Amend User Roles within org	✓	▪	▪
Amend own role within org	✓	▪	▪
Supplier Registration	✓	✓	✓
Catalogue Access Management	✓	✓	✓
**** Administer Classification views*	✓	✓	✓
Catalogue Management	✓	✓	✓

* This should only be done by Procserve Service Desk / support teams.
** This should be done by the buying organisation and not Value Wales.
*** Classification views need to be created and maintained in Catalogue Access Management and not the new Buyer Portal.
^. Only if granted access by Community Administrator to other orgs

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2.2.2.2.5 Buying Organisation Roles Matrix

When assigning roles to a user in a buying organisation, although other roles may be visible, only the following should be used.

Note: Buyer Super User role is no longer used.

Role Description	**Buyer Administrator**	**Buyer Basic**	**Buyer Reporter**
My Transactions	▪	▪	✓
Document Tracker	▪	▪	✓
Supplier Directory	✓	✓	✓
Organisation Management	✓	▪	▪
User Management	✓	▪	▪
Create new users within org	✓	▪	▪
Edit existing user within org	✓	▪	▪
Amend User Roles within org	✓	▪	▪
Amend own role within org	✓	▪	▪
Supplier Registration	✓	▪	▪
Catalogue Access Management	✓	▪	▪
**** Administer Classification views*	✓	▪	▪
Catalogue Management	✓	▪	▪

*** Classification views need to be created and maintained in Catalogue Access Management and not the new Buyer Portal.

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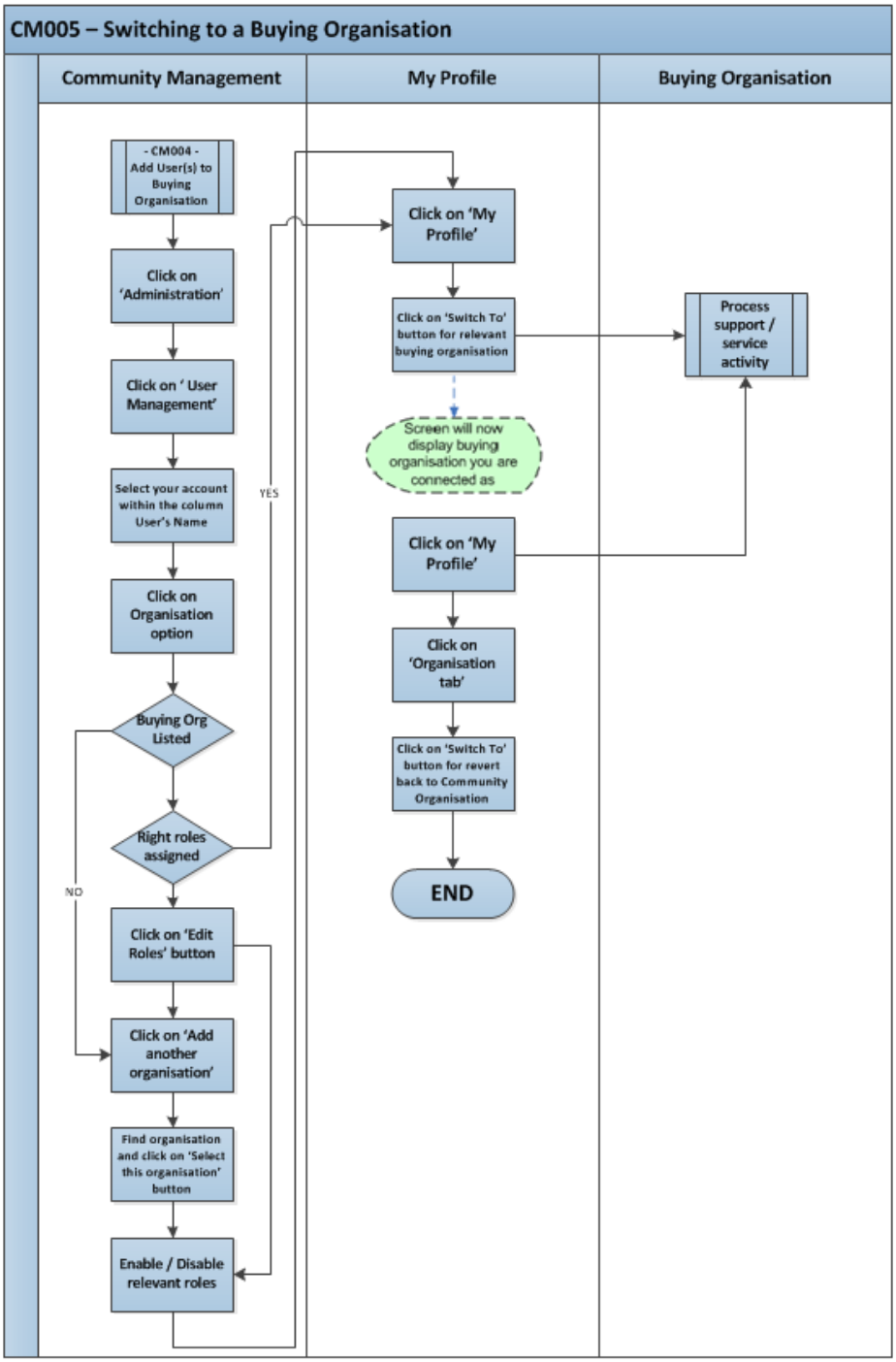
2.2.2.2.6 Switching Organisations

Overview

This section highlights how you can switch organisations to work in their organisation and troubleshoot issues.


CM005 – Switching to a Buying Organisation
Community Management
My Profile
Buying Organisation
- CM004 - Add User(s) to Buying Organisation
Click on 'Administration'
Click on ' User Management'
Select your account within the column User's Name
Click on Organisation option
Buying Org Listed
Right roles assigned
Click on 'Edit Roles' button
Click on 'Add another organisation'
Find organisation and click on 'Select this organisation' button
Enable / Disable relevant roles
YES
NO
Click on 'My Profile'
Click on 'Switch To' button for relevant buying organisation
Screen will now display buying organisation you are connected as
Click on 'My Profile'
Click on 'Organisation tab'
Click on 'Switch To' button for revert back to Community Organisation
END
Process support / service activity

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Switching Organisations

Note: As the above flow chart suggests, there are different steps required to switch organisations depending on your current user configuration. The following instruction will show the full process as if this was the first time you have the requirement to switch to the organisation. This is done in two main steps:

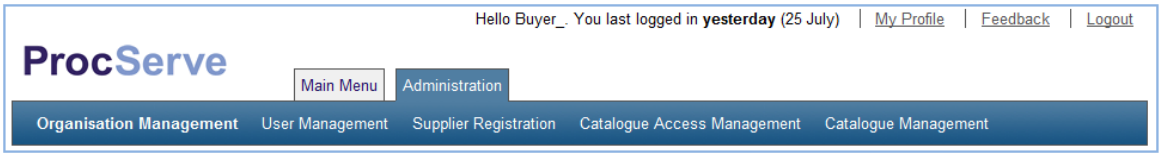
Adding the organisation to your Profile and

Adding Roles that the user will have within this organisation

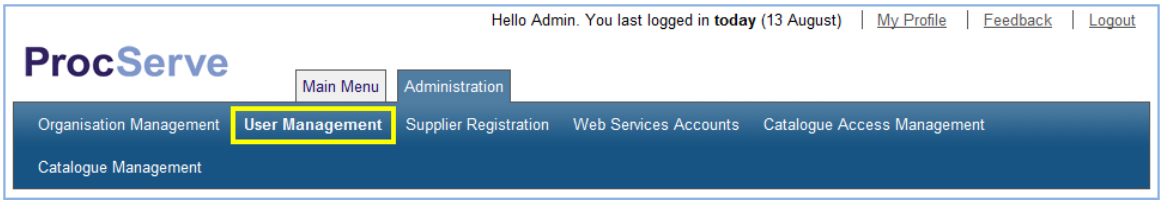
Adding an organisation to a user profile

1. Log in to Procserve Commerce Hub.

2. Click on 'Administration'

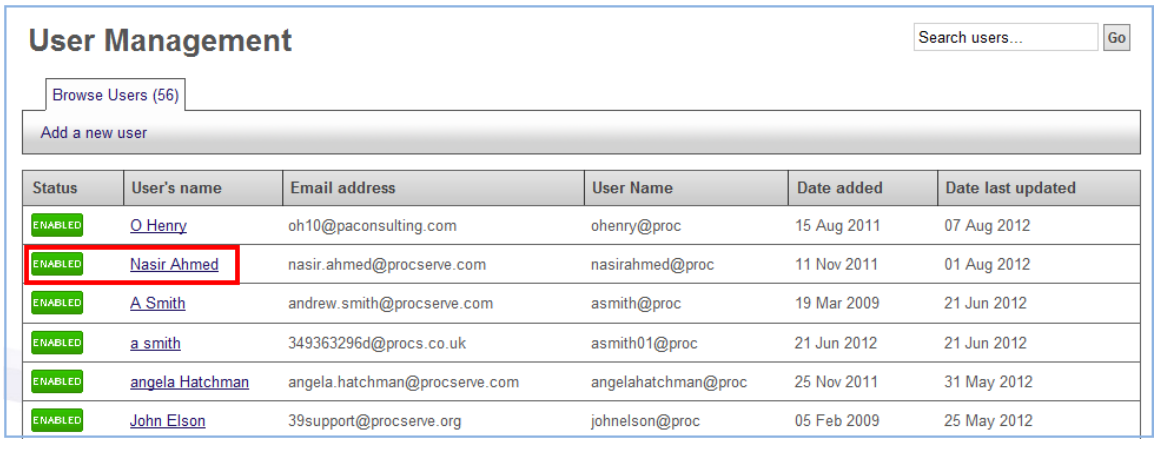


3. Click on 'User Management'



4. Search for the user you wish to add the organisation to.

5. Click on the link of the user.



6. Click on the 'Organisations' tab

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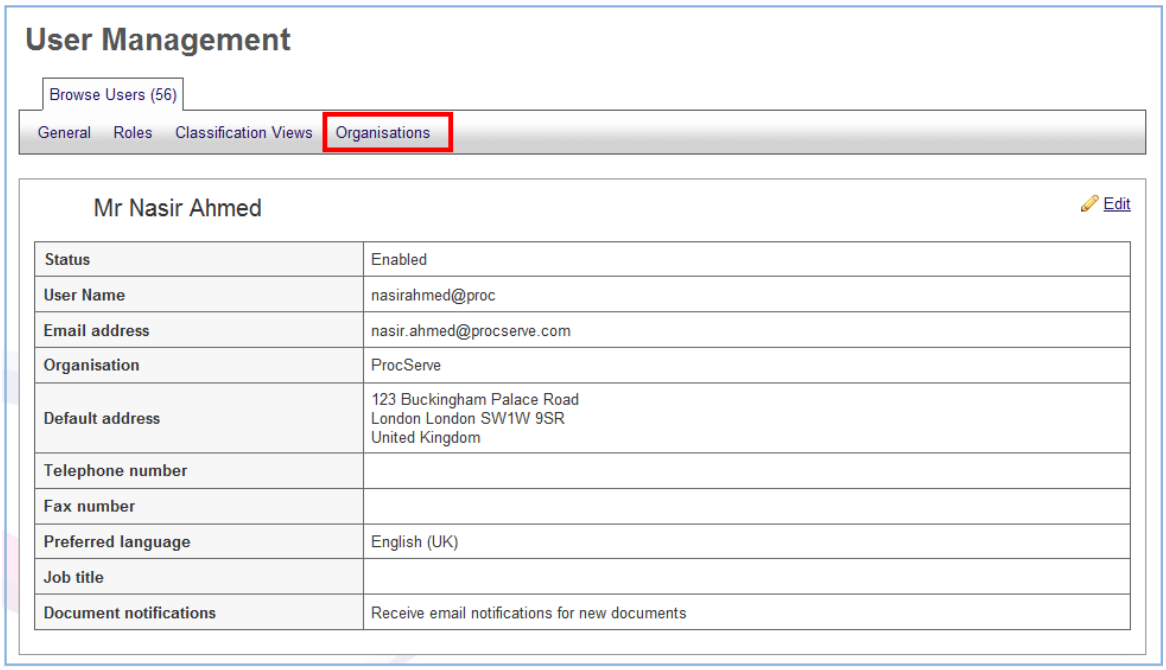

You will see the organisations you already have access too

Tip! You can edit the roles you have in the existing organisations from this screen too.

7. Click on 'Add another organisation' at the footer of the page

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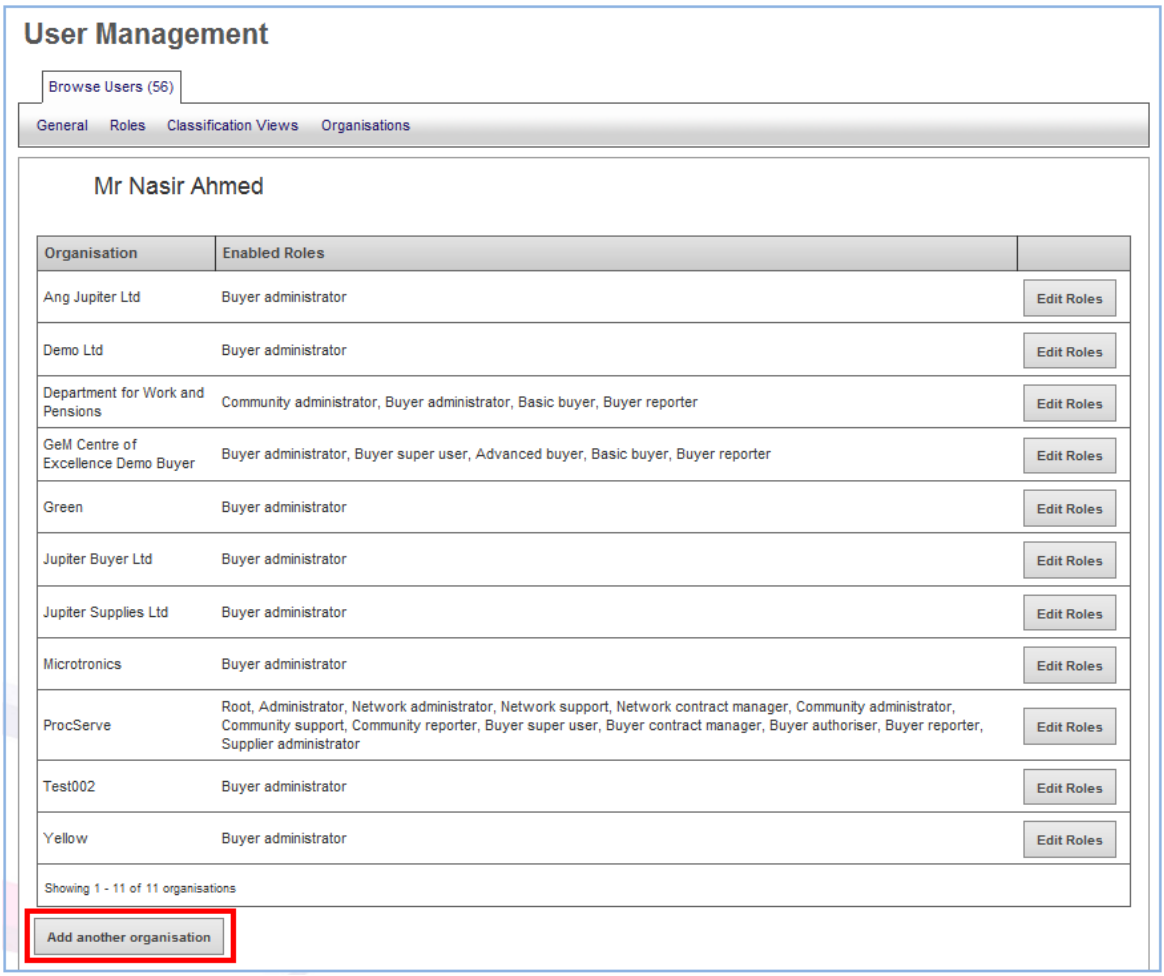
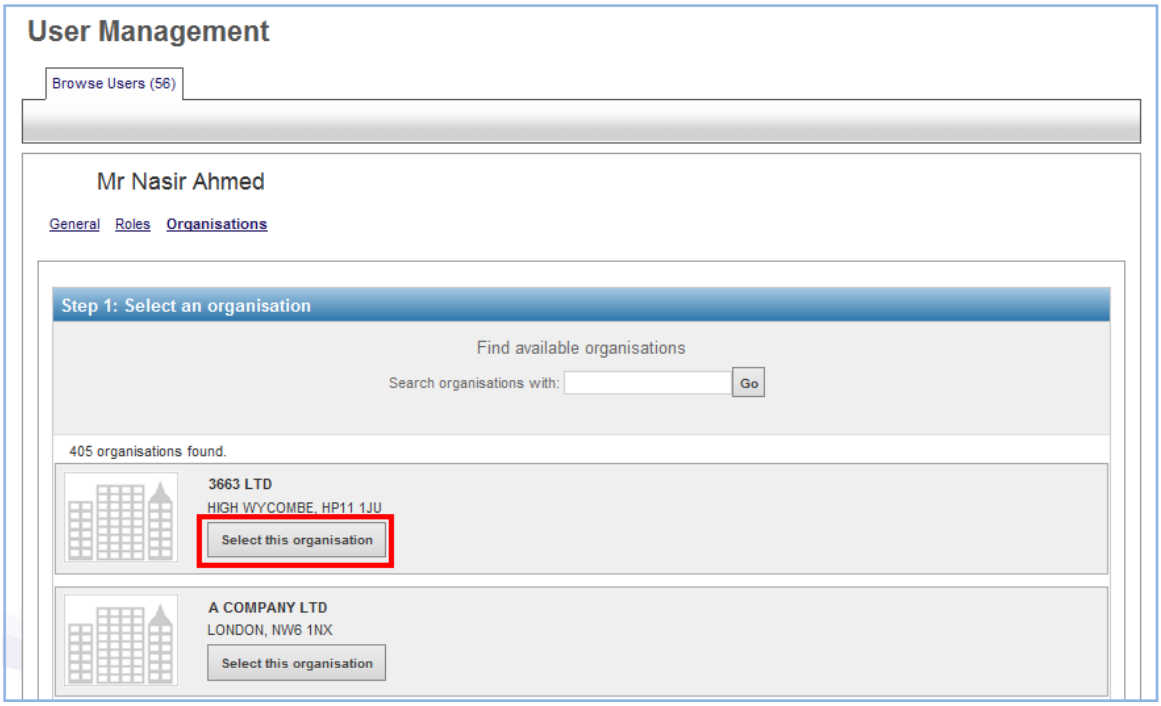


8. Search for the organisation you wish to add the user too



9. Click 'Select this organisation' button of the organisation you wish to add to the user

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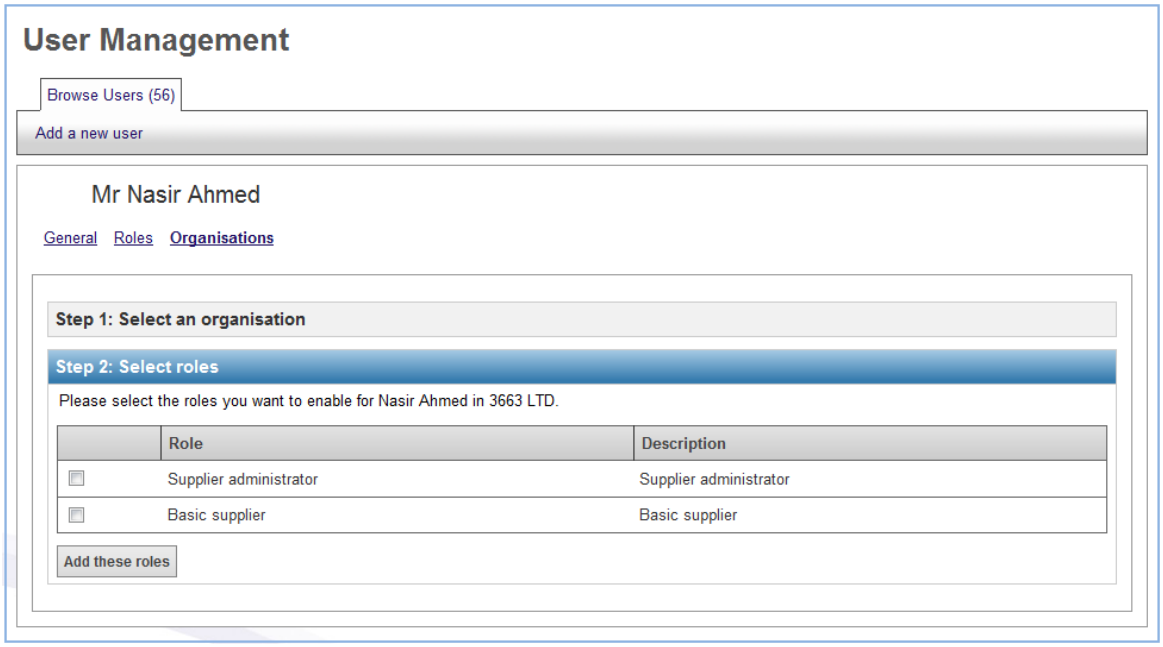
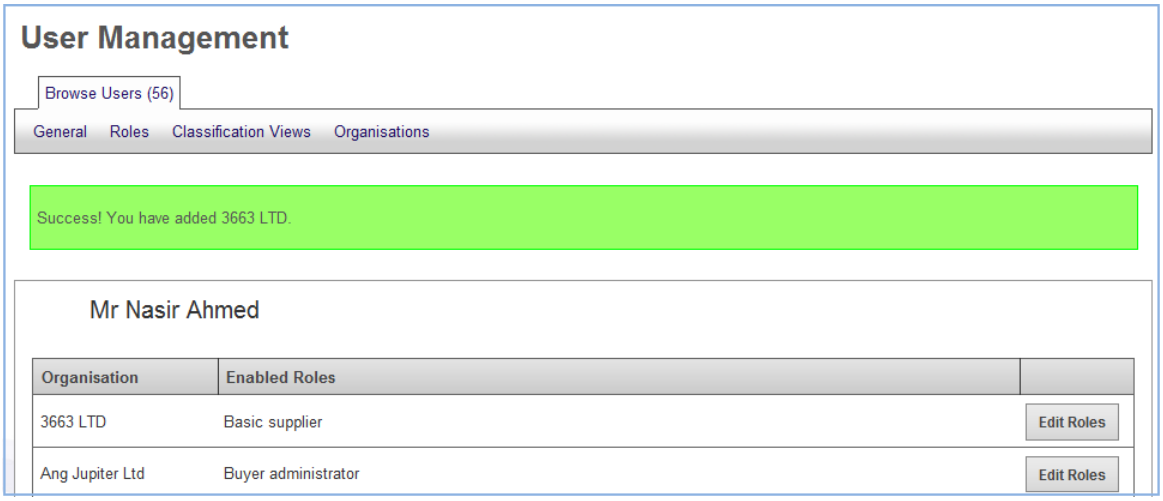
10. You can then add roles to the user to complete the required tasks within the organisation.



11. When complete click 'Add these roles'

You will get a success menu.



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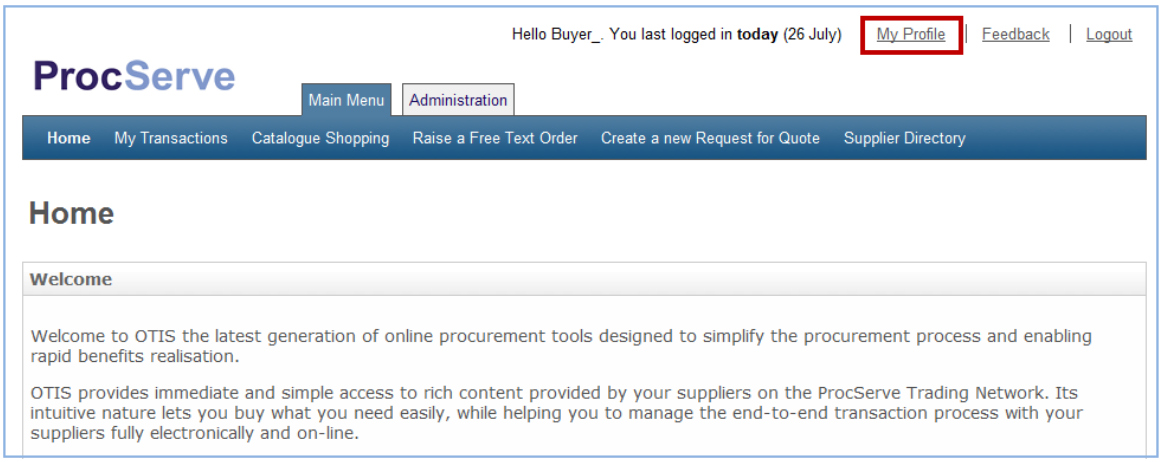
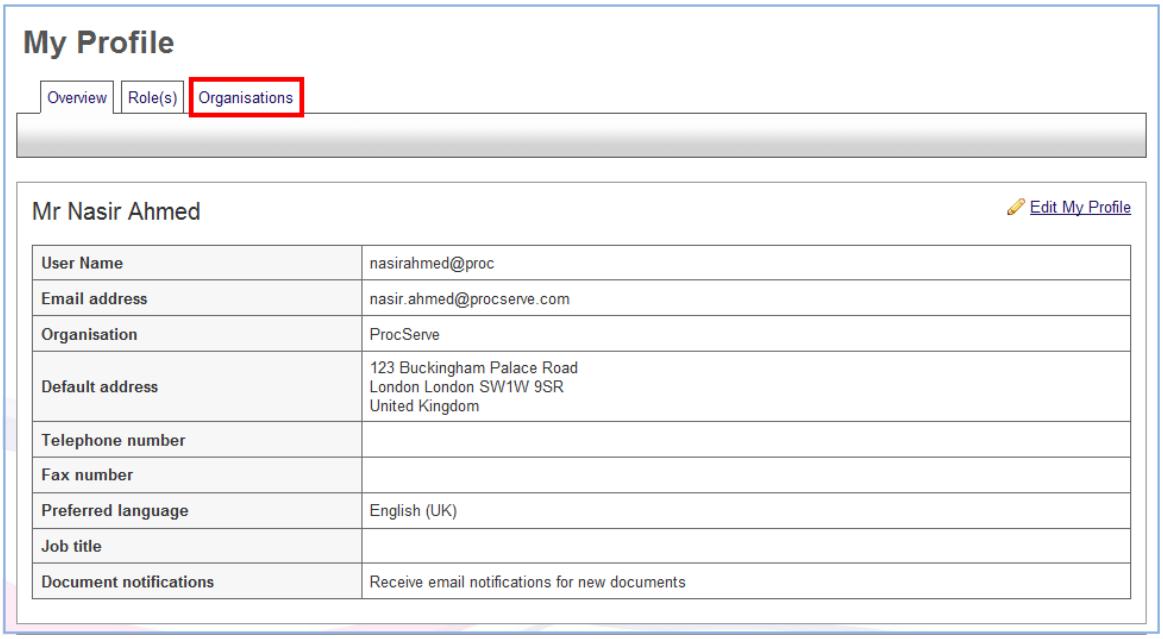
Switching to the Organisation

1. Click on 'My Profile'


Hello Buyer_. You last logged in today (26 July)
My Profile
Feedback
Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.

2. Click on the' Organisations' tab



You will then be presented with the organisations you can switch too.

3. Click on the 'Switch to' button next to the organisation you wish to switch to

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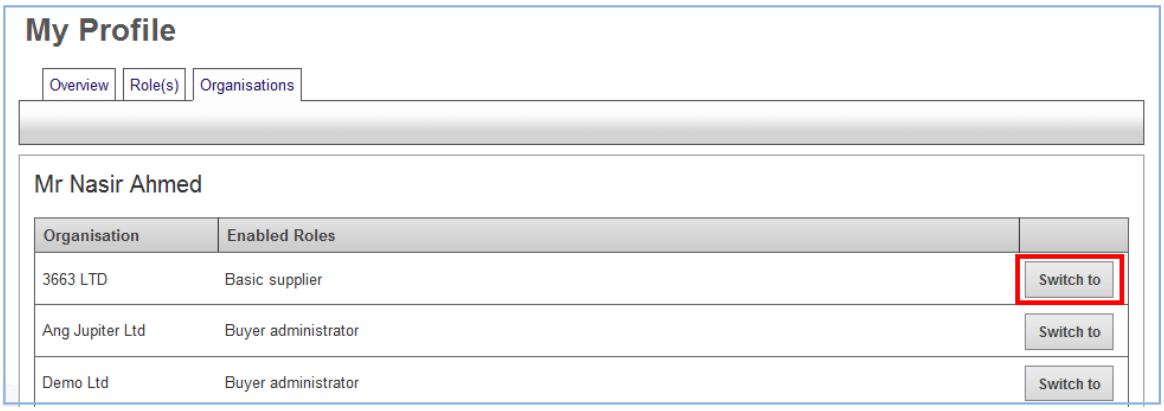
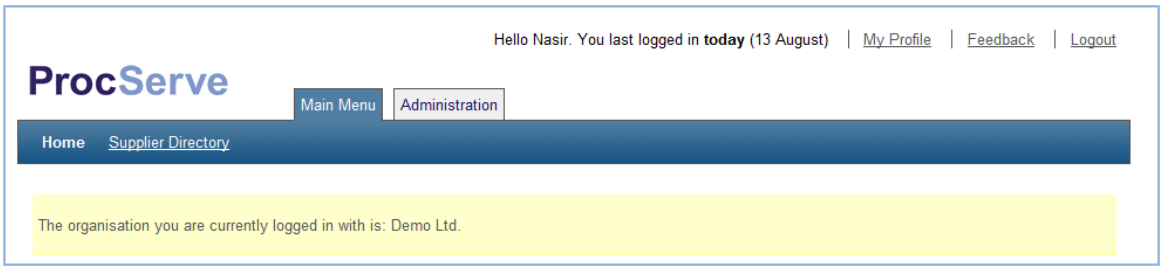


When you have switched organisation you will have the roles assigned to the user for that organisation. You will also be presented with a text box stating which organisation you are currently working as.



To switch back you can either go to 'My Profile' and select your organisation or log out and log in again.

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2.2.2.3 Hybrid Communities

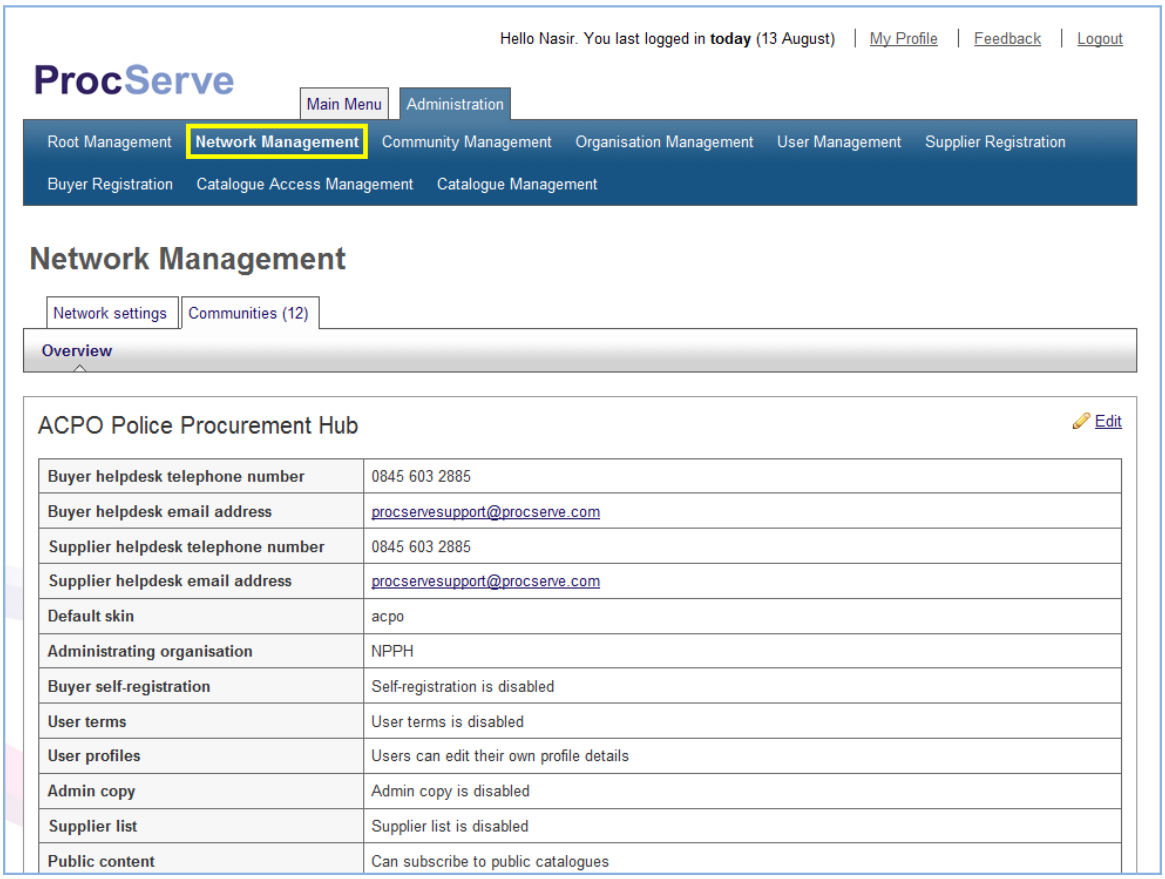
2.2.2.3.1 Overview

A ‘Hybrid Community’ is used where a community has a significant need to share content but still require individual buying organisation to control some of their content, in particular double Punch-Out suppliers.

Managing the sharing of catalogues and classification views will be done from OTIS. The community members will have a list of catalogues available to them. The catalogues available consist of:

- Network catalogues available to the community
- Community catalogues made available to all members
- Catalogues other community members have shared with the buying organisation
- Catalogues shared by network members outside the hybrid community
- Private catalogues only available to the individual buyer

The below shows a Hybrid Community



Under ‘Community Management’ select the Community you want to manage from the drop-down box – in this case the Hybrid community ‘PS Demo Community’

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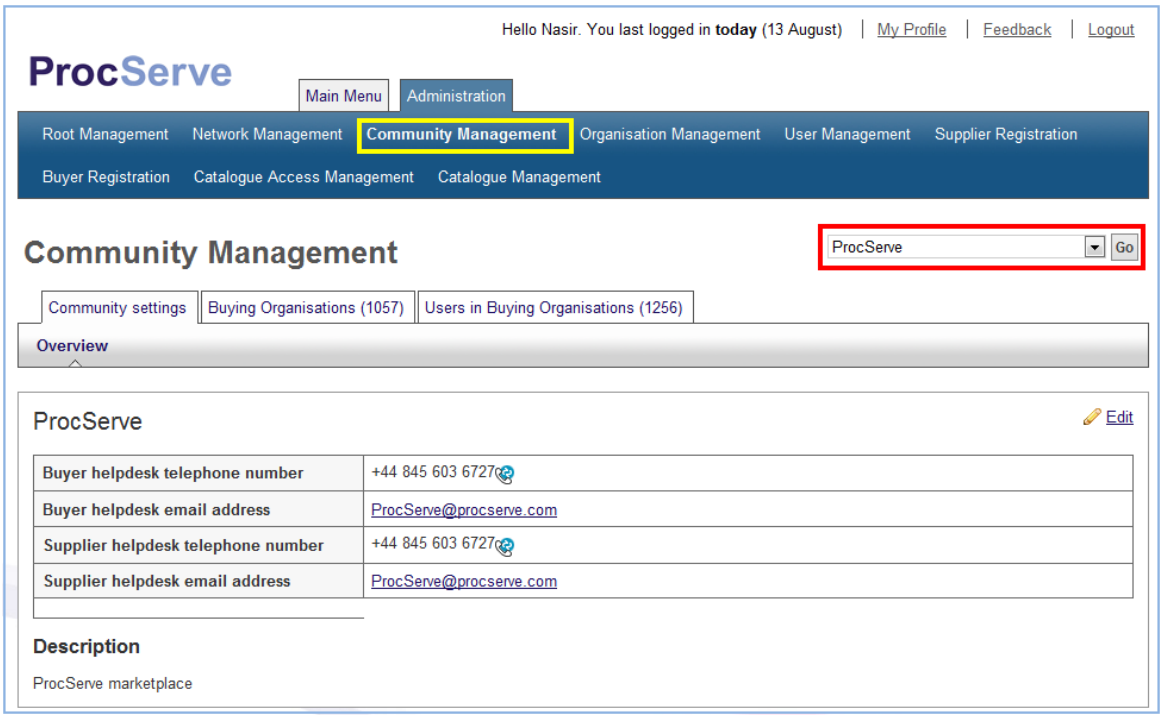

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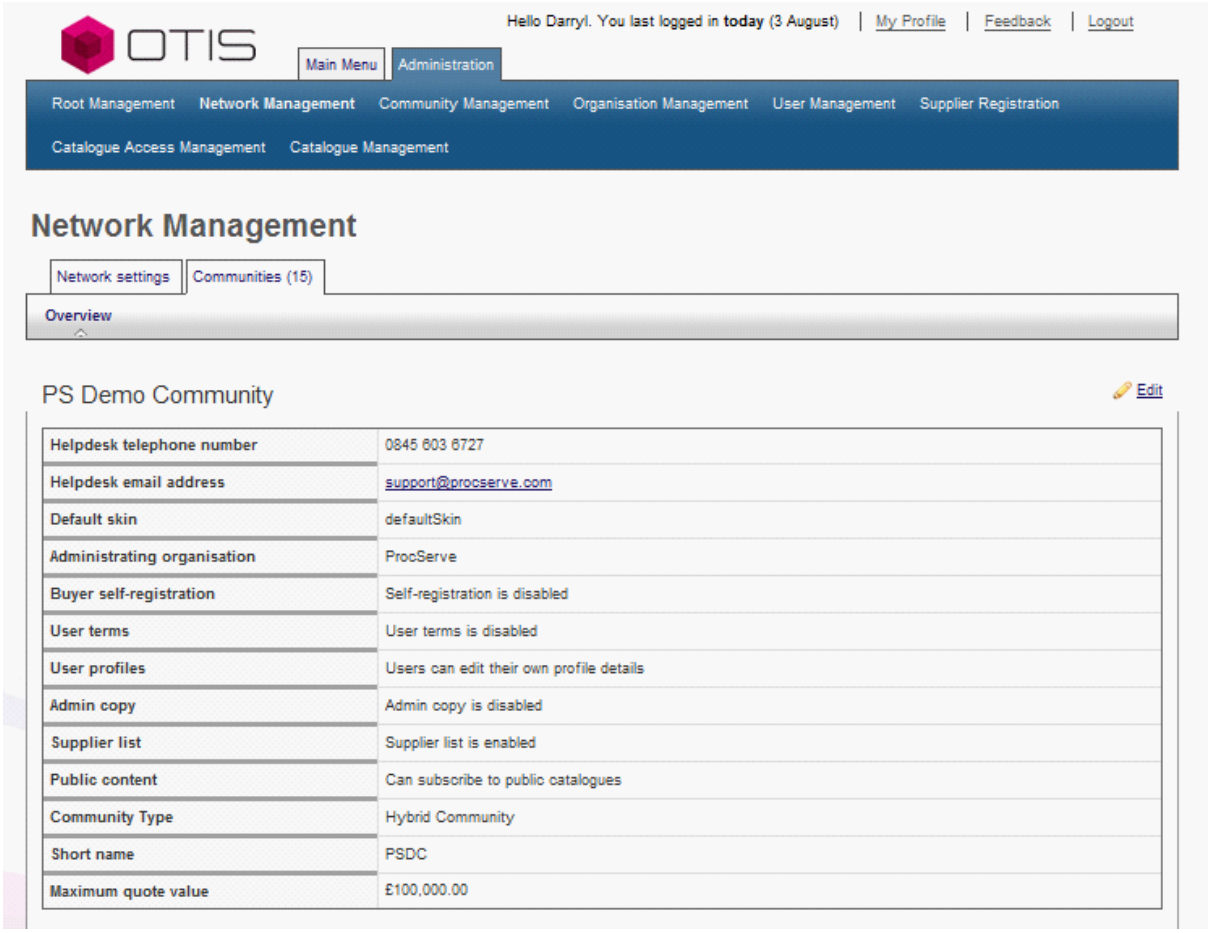
2.2.2.3.2 Sharing catalogues within a Hybrid Community

Managing the sharing of catalogues and classification views will be done from OTIS. The community members will have a list of catalogues available to them. The catalogues available consist of:

- Network catalogues available to the community
- Community catalogues made available to all members
- Catalogues other community members have shared with the buying organisation
- Catalogues shared by network members outside the hybrid community
- Private catalogues only available to the individual buyer

The below shows a Hybrid Community



Under ‘Community Management’ select the Community you want to manage from the drop-down box – in this case the Hybrid community ‘PS Demo Community’

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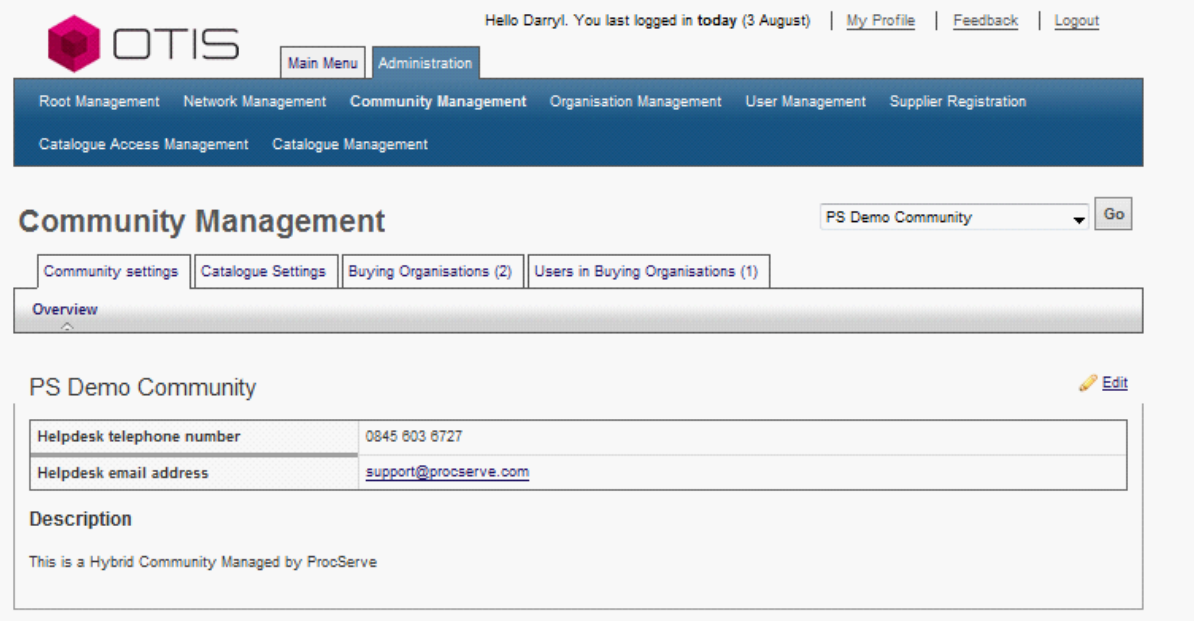
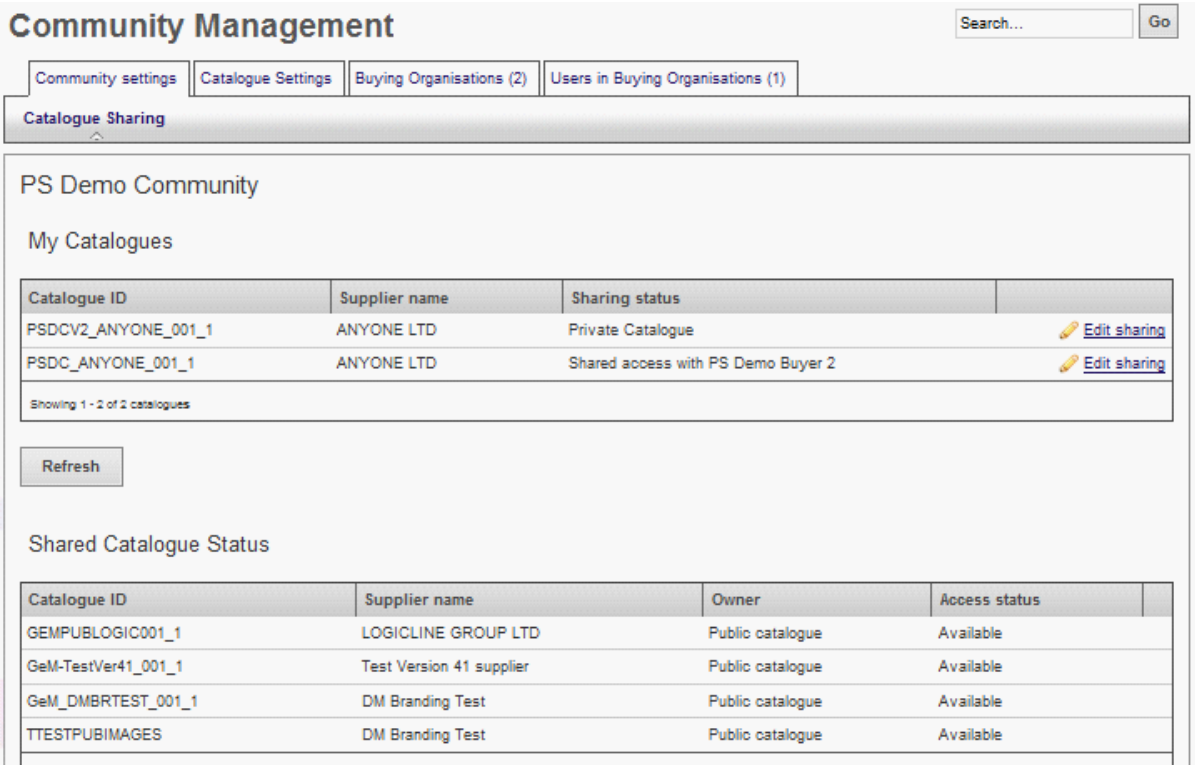


To share catalogues across the community or with specific buying organisations within your community, select 'Catalogue Settings'



Two catalogue types – 'My Catalogues' and 'Shared Catalogues'

Catalogue settings is an additional tab available for Hybrid Communities

To share a catalogue click 'Edit Sharing'. It provides the following options:

- *Shared with whole community* – shares with all Buying organisations in the community

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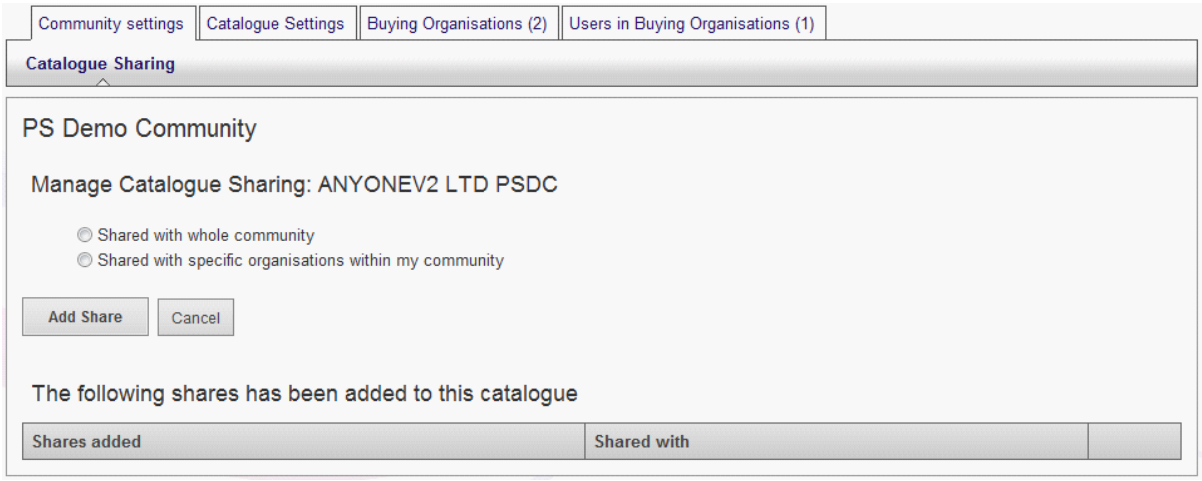
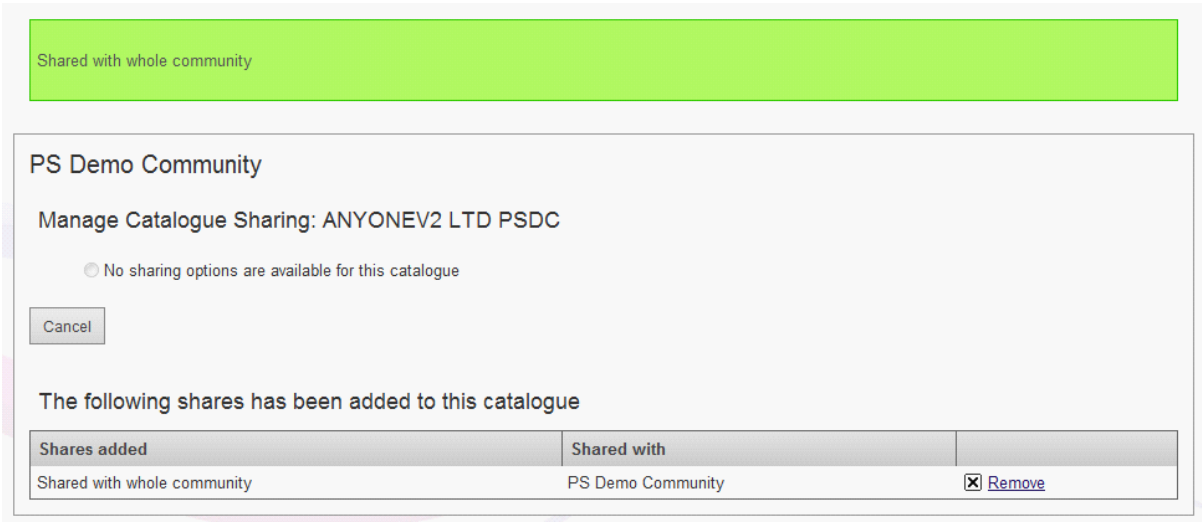
- *Shared with specific organisations within my community* - allows you to select which Buying organisations can have access



Selecting 'Shared with whole community' and clicking 'Add Share' will display the Shared Classification for the catalogue with a green confirmation message:



If you select 'Shared with specific organisations within my community' you will then be prompted to select specific Buying organisations from the community which you can share the catalogue with.

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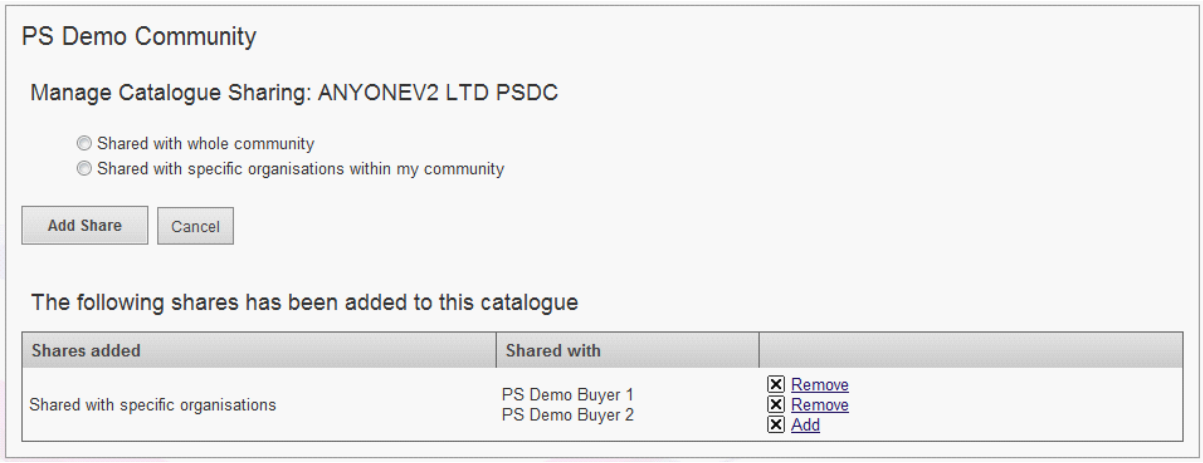
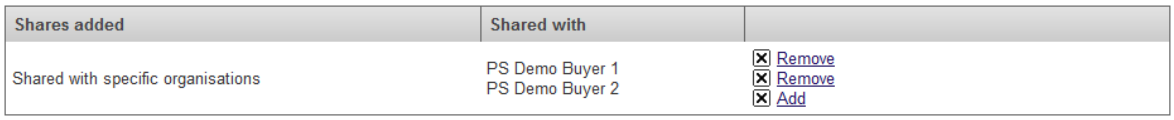
Click ‘Add Share’ against Buying organisation that require access to that catalogue



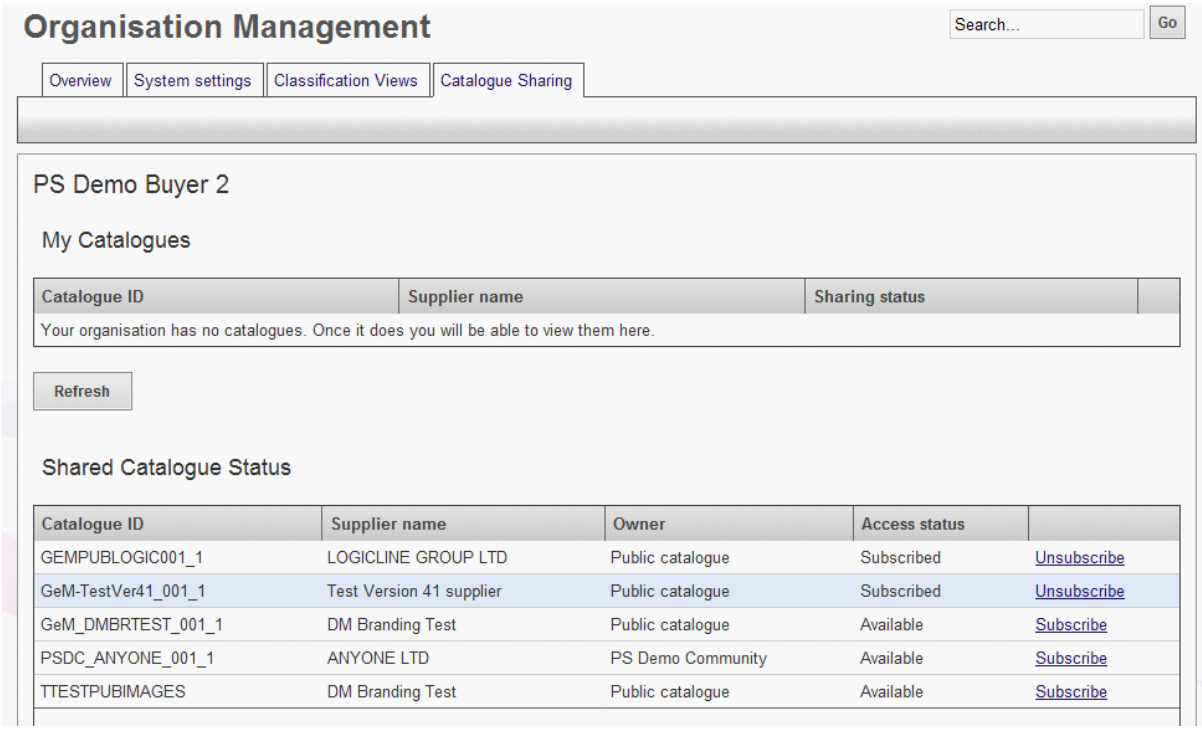
To remove the sharing classification of your catalogue from selected Buying Organisations, simply click ‘Remove’ for that particular Buying organisation from the list of shares.



ORGANISATION MANAGEMENT

As a Buying Organisation that is part of a Hybrid Community you have the ability to subscribe or unsubscribe to catalogues that have been shared with you.

Under the ‘Catalogue Sharing’ tab it will provide a list of shared catalogues, either from the Network, the Community or other Buying organisations.



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2.2.3 Administering Procserve Commerce Hub

2.2.3.1 Managing my Organisation

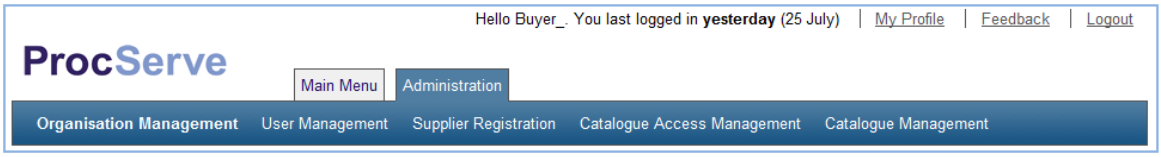
2.2.3.1.1 Editing the Organisation's General Details

Overview

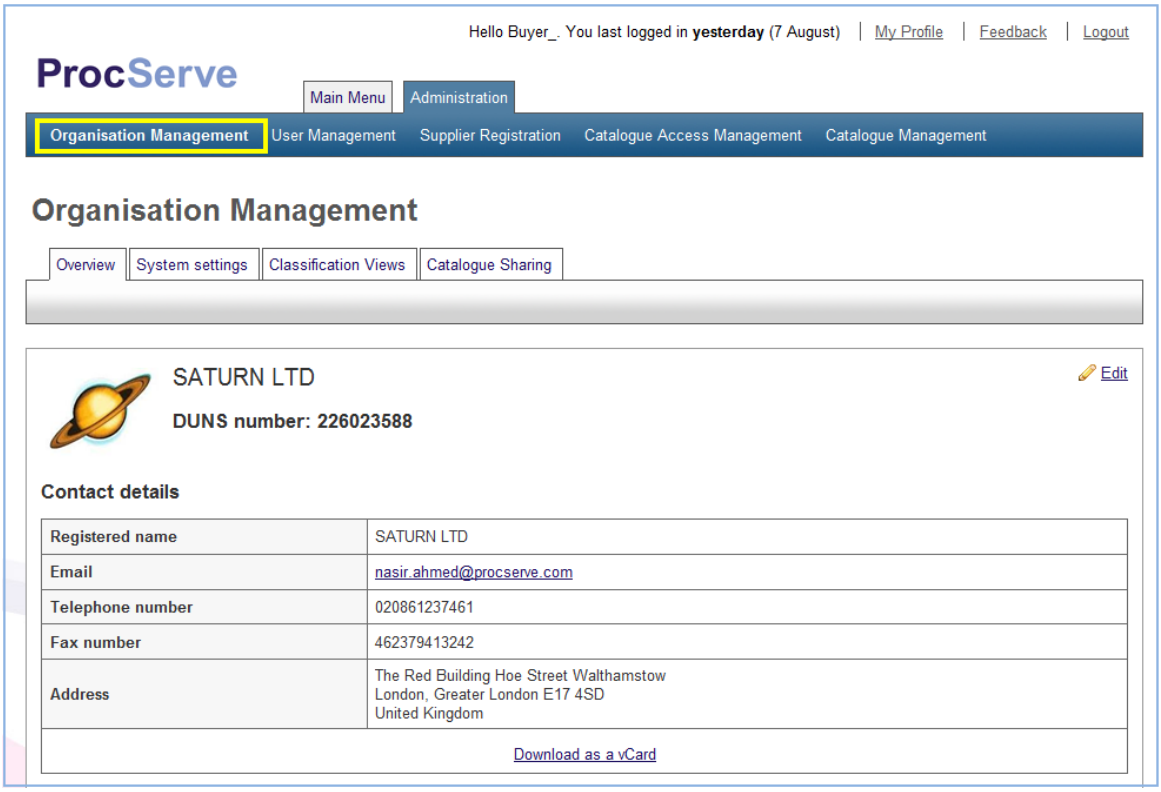
You can view and edit the the general address details of your organisation in 'Organisation Management'.

Editing your Organisation's overview

1. Click on the 'Administration' tab



2. Click on 'Organisation Management'



3. To edit the details click 'Edit'

4. Once complete click 'Save Changes'

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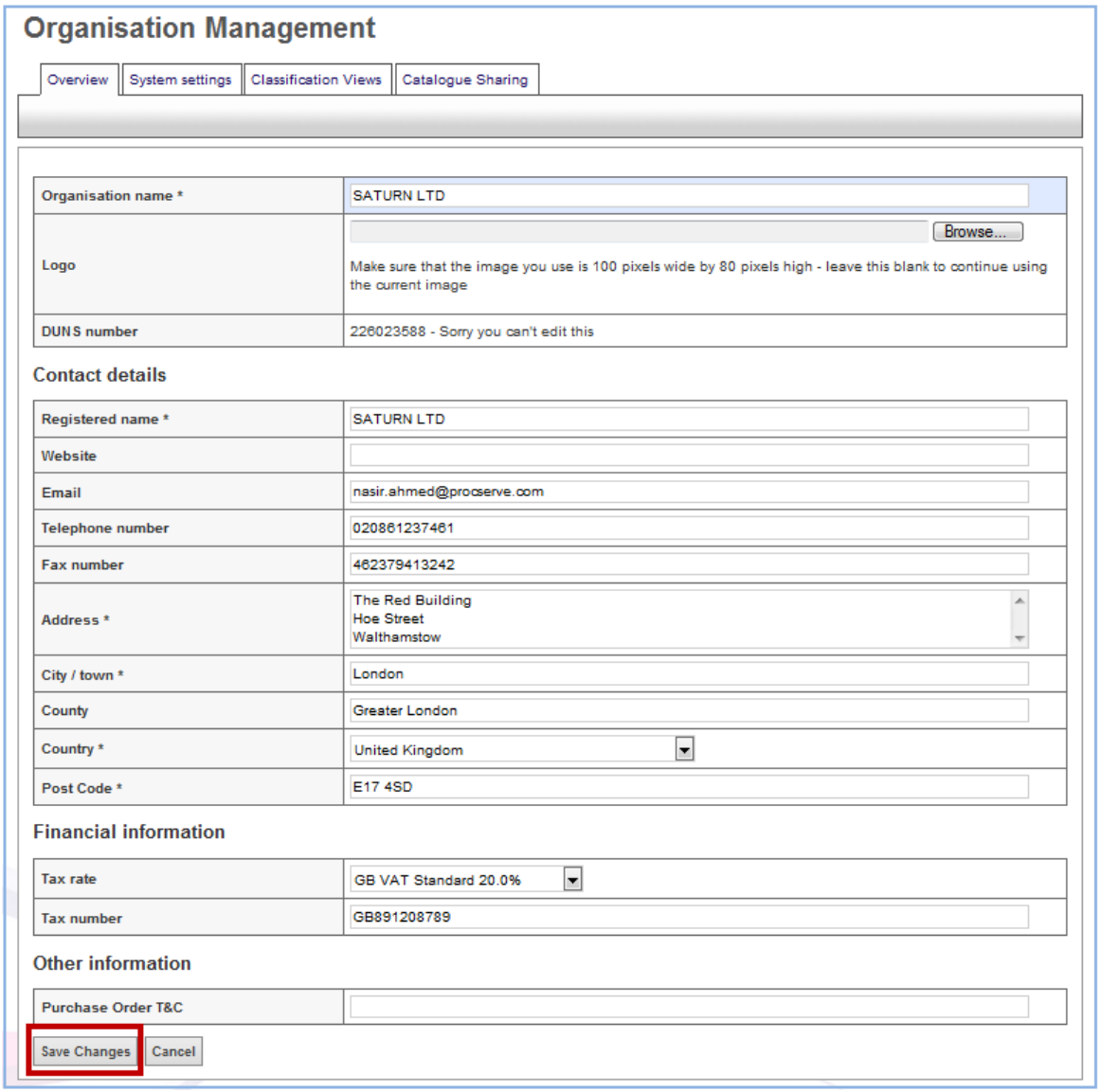

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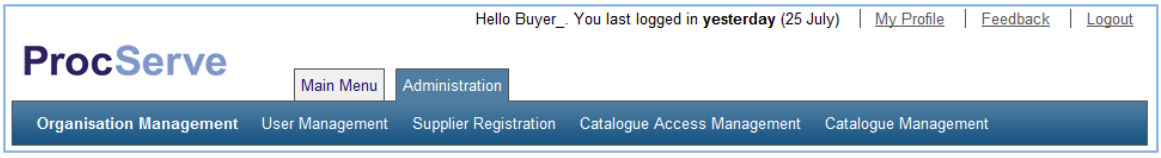
2.2.3.1.2 Editing the Organisation's System Details

Overview

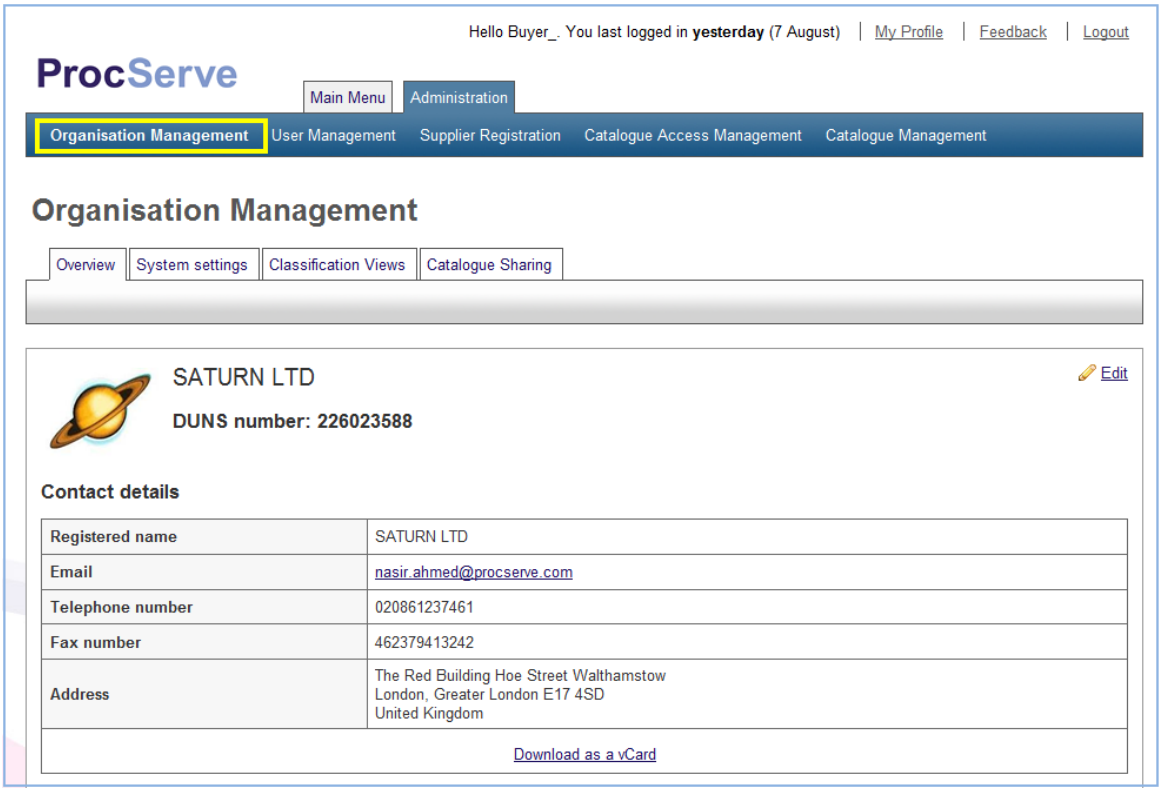
You can edit your organisations system settings in 'Organisation Management' 'System Settings'

Editing your organisation's system settings

1. Click on the 'Administration' tab



2. Click on 'Organisation Management'



3. Click on 'System Settings'

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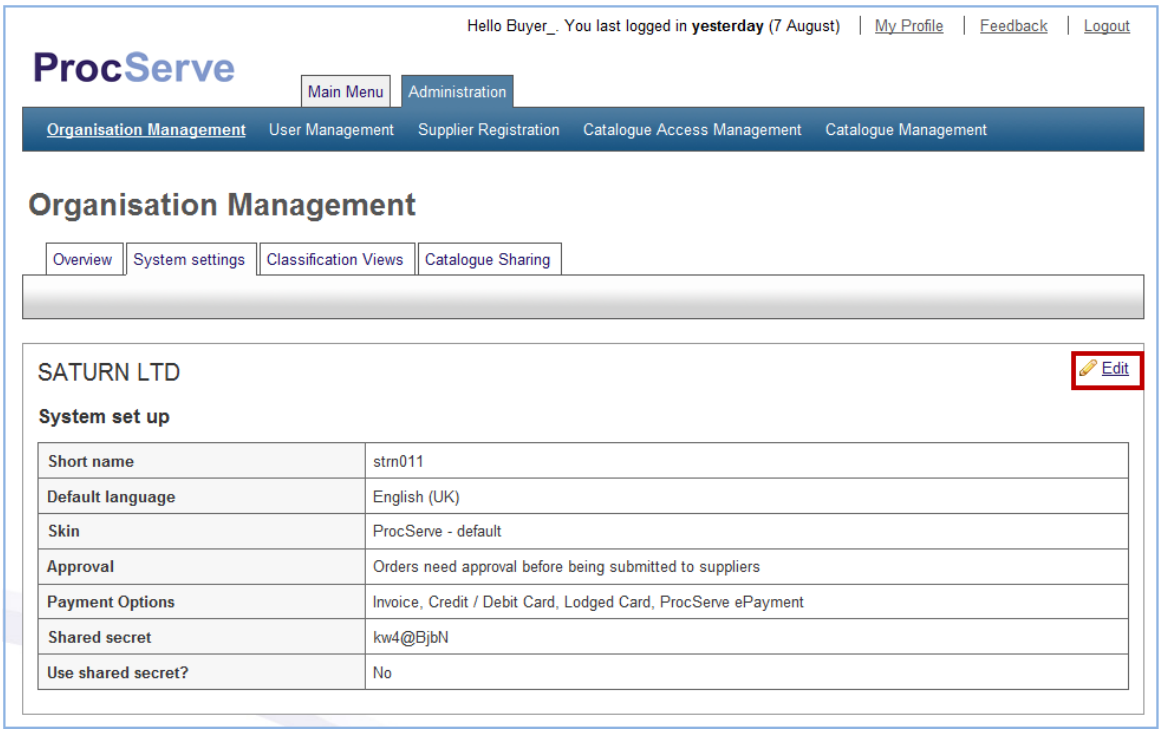
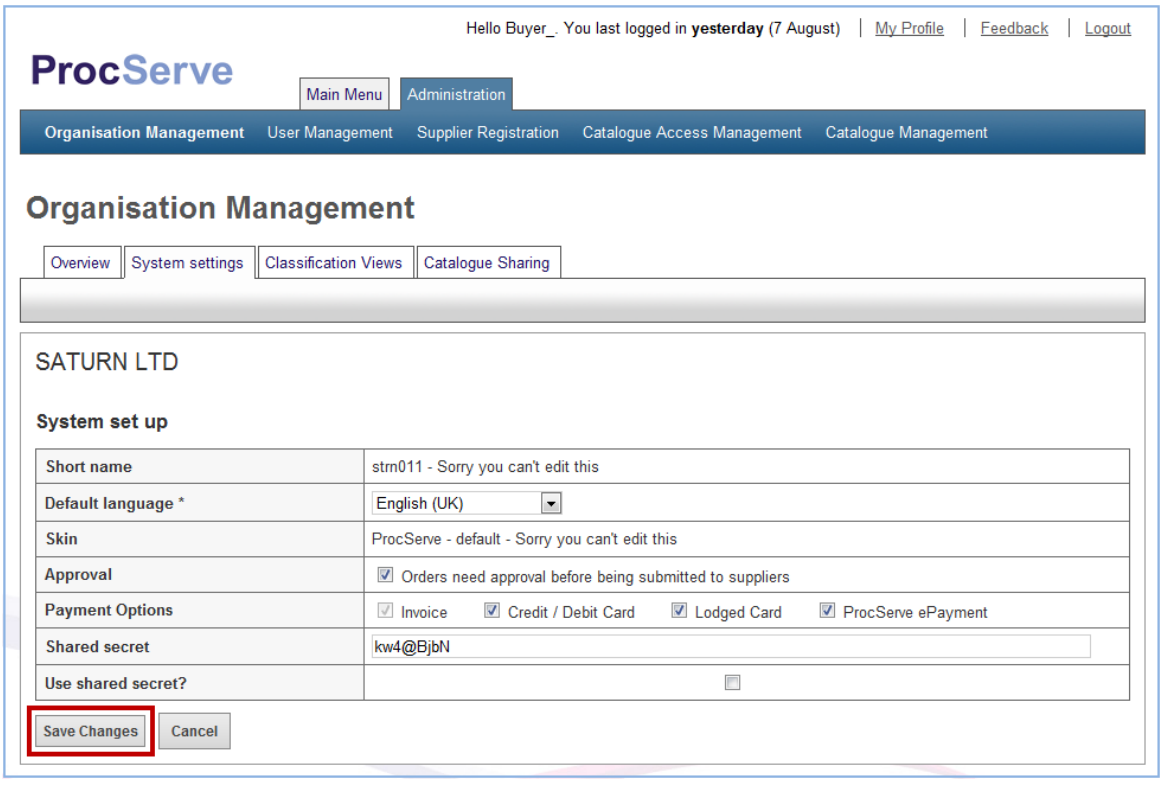


4. To edit the system settings click 'Edit'



5. Once complete, click 'Save Changes'

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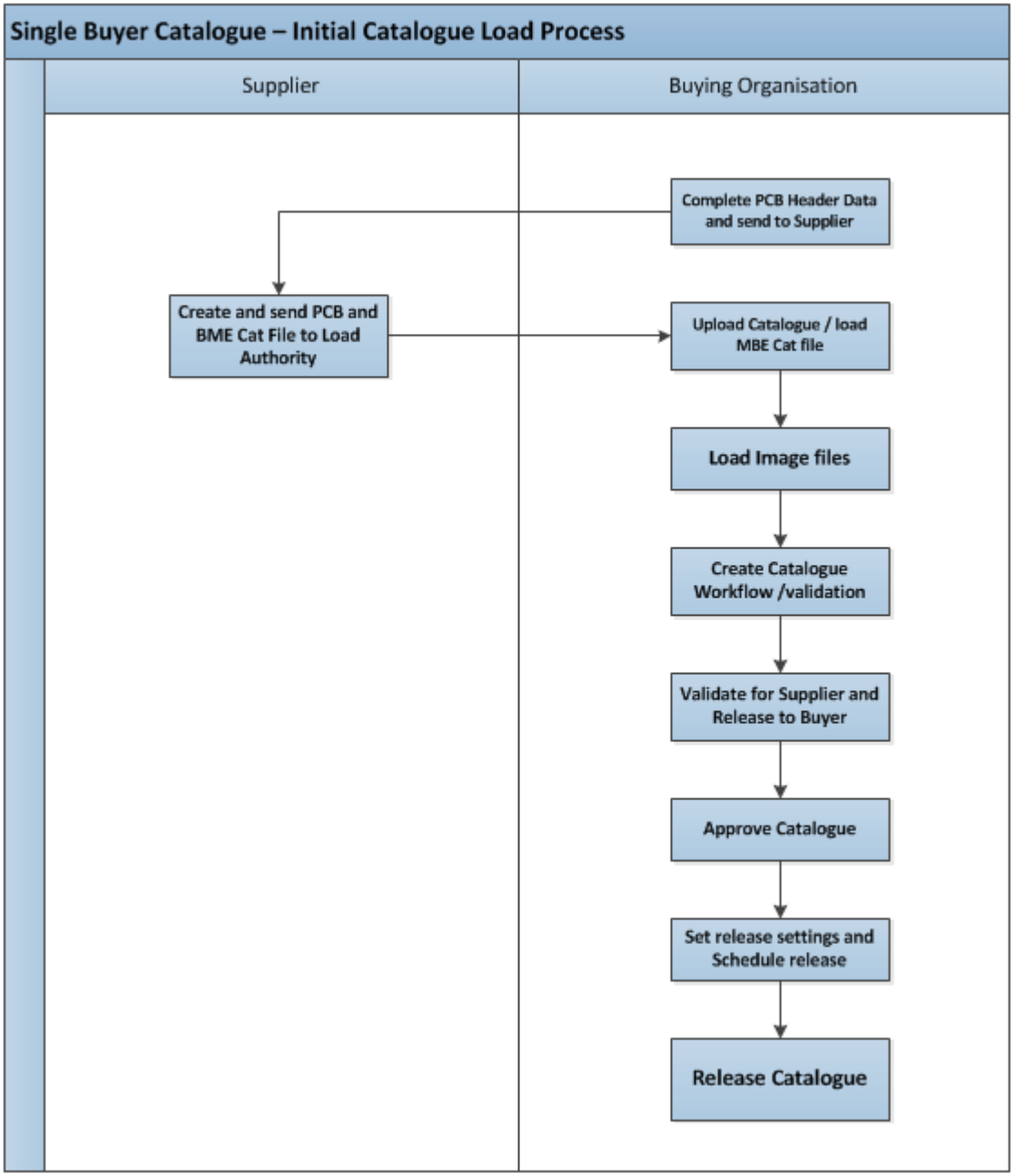
3
Catalogue Management

3 Catalogue Management

3.1 Single Buyer Catalogue Initial Load

3.1.1 Overview

This section describes the process of loading and configuring a catalogue for a single buying organisation using the Catalogue Management.


Single Buyer Catalogue – Initial Catalogue Load Process
Supplier
Buying Organisation
Complete PCB Header Data and send to Supplier
Create and send PCB and BME Cat File to Load Authority
Upload Catalogue / load MBE Cat file
Load Image files
Create Catalogue Workflow /validation
Validate for Supplier and Release to Buyer
Approve Catalogue
Set release settings and Schedule release
Release Catalogue

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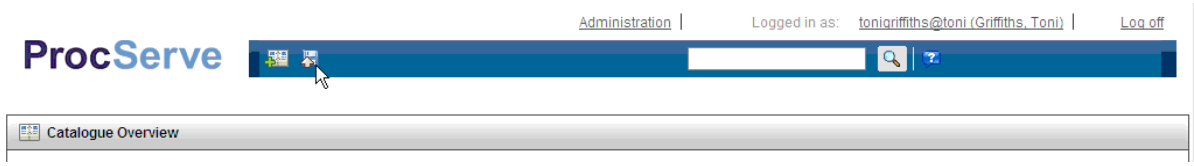
3.1.2 Importing the Catalogue

The following steps describe how you upload and configure a catalogue for the first time.

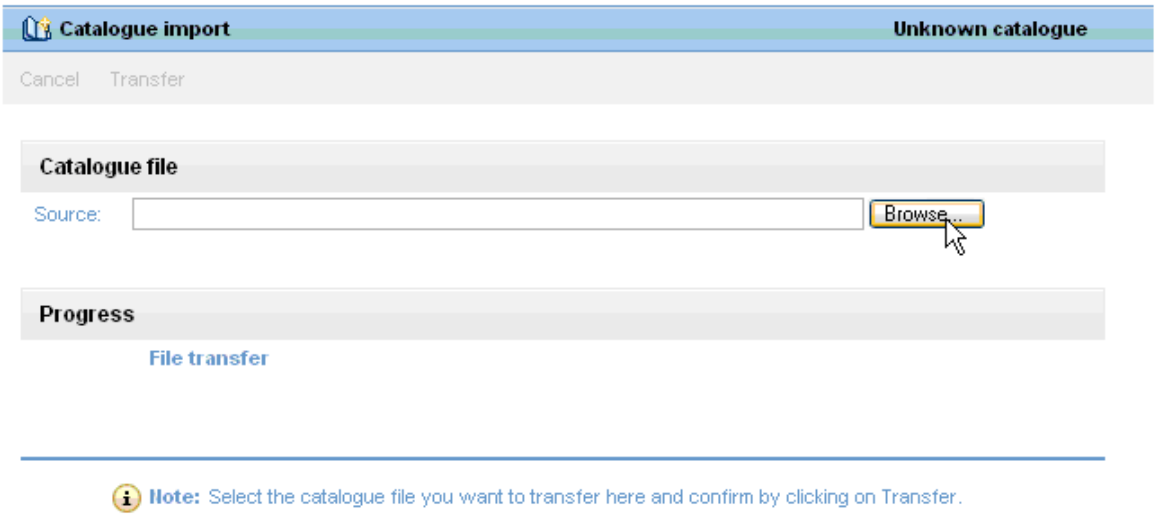
1. **Navigate Admin Menu >> Catalogue Management:**
   The catalogue manager is displayed.

2. **Click on Import Analysis**:



3. **Import the BMECat File:**

In the Import Analysis page click the Browse button or enter a path and file name in the source field.
Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.



4. **Click on Transfer in the top left corner:**

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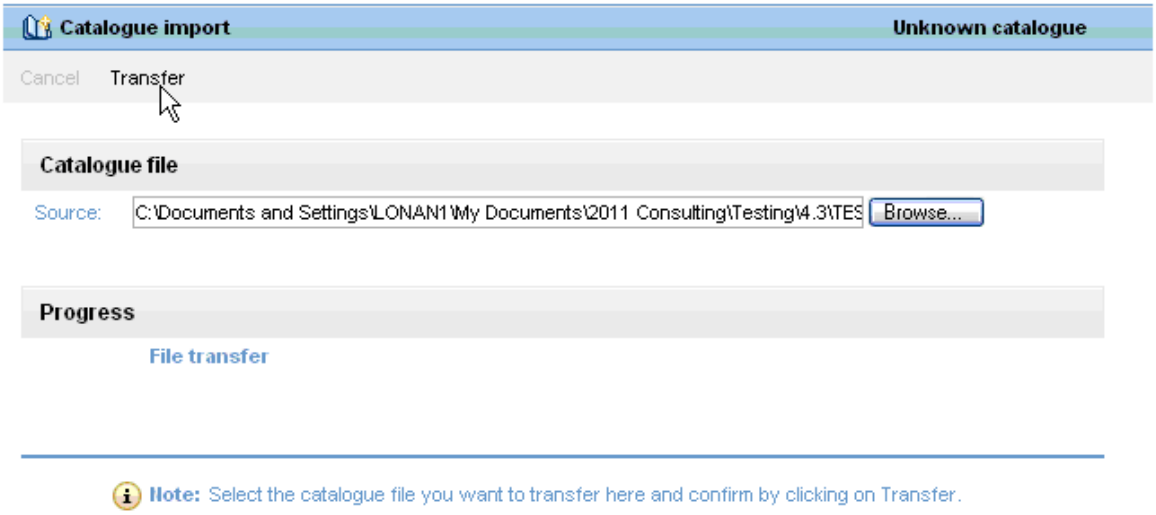
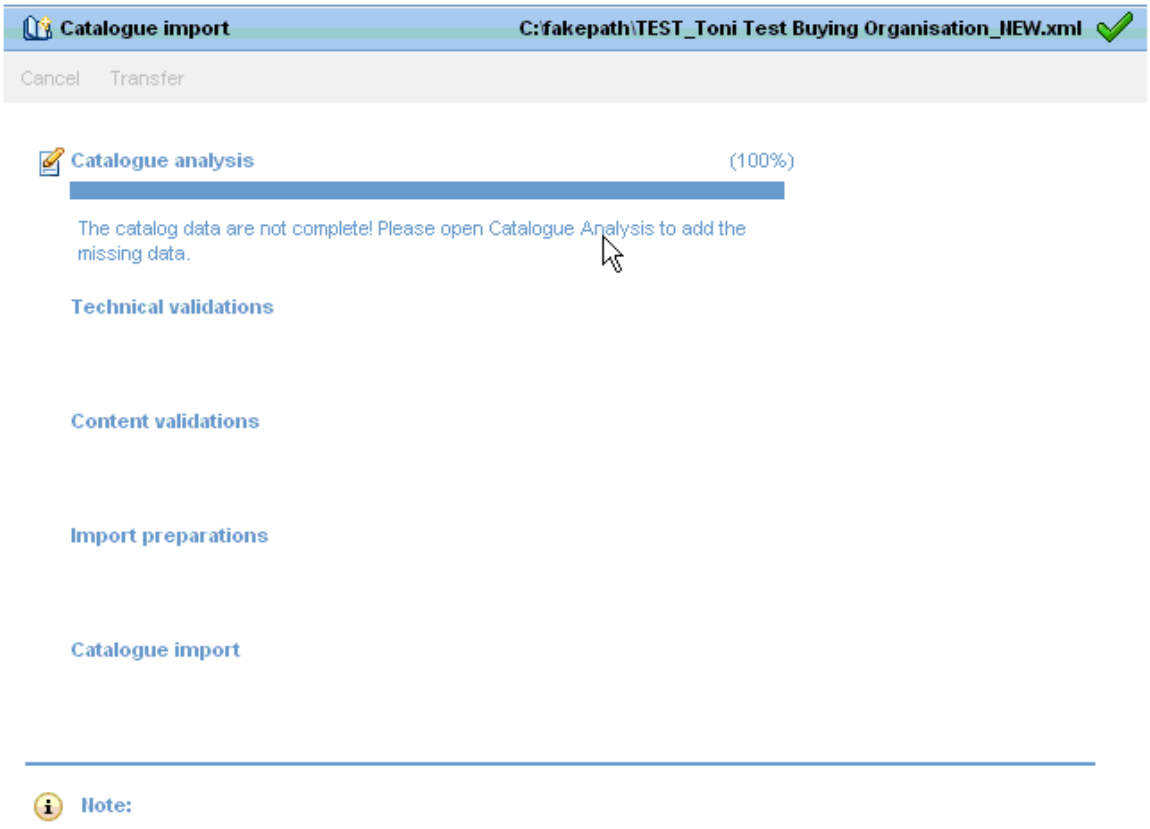


5. During the import process, catalogue manager will stop the import and you will be prompted to run a catalogue analysis. **Click on the catalogue analysis link:**



6. Verify the details in the catalogue analysis pop up window:

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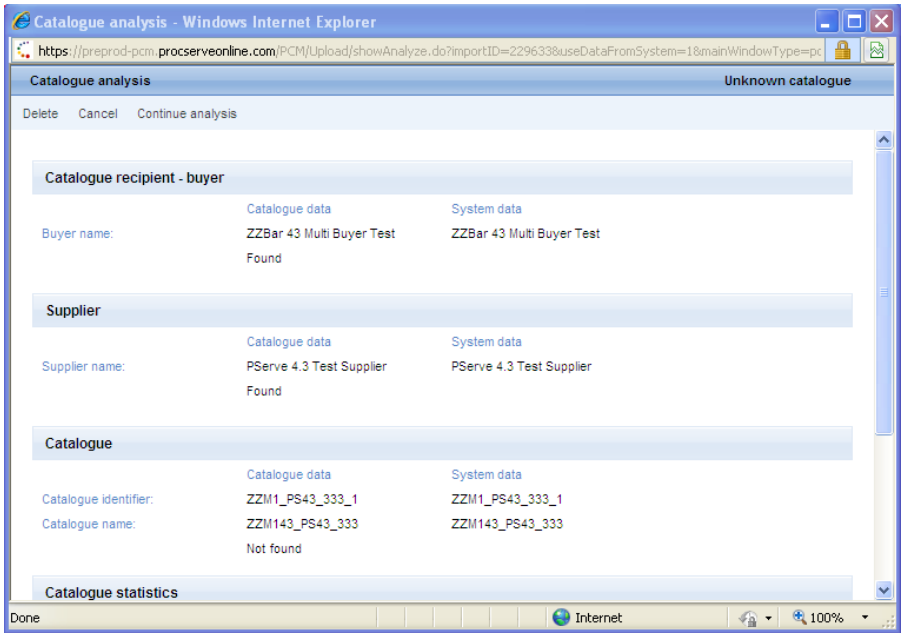

Note: Check the buyer and supplier are 'Found'. If not, click on cancel to exit the import and correct the errors in the Procserve Catalogue Builder and reload the file.

Note: The catalogue should be 'Not Found' which is correct as its a new catalogue.

7. **Click on Continue Import**

8. **Once the import is successfully completed the confirmation screen is displayed:**

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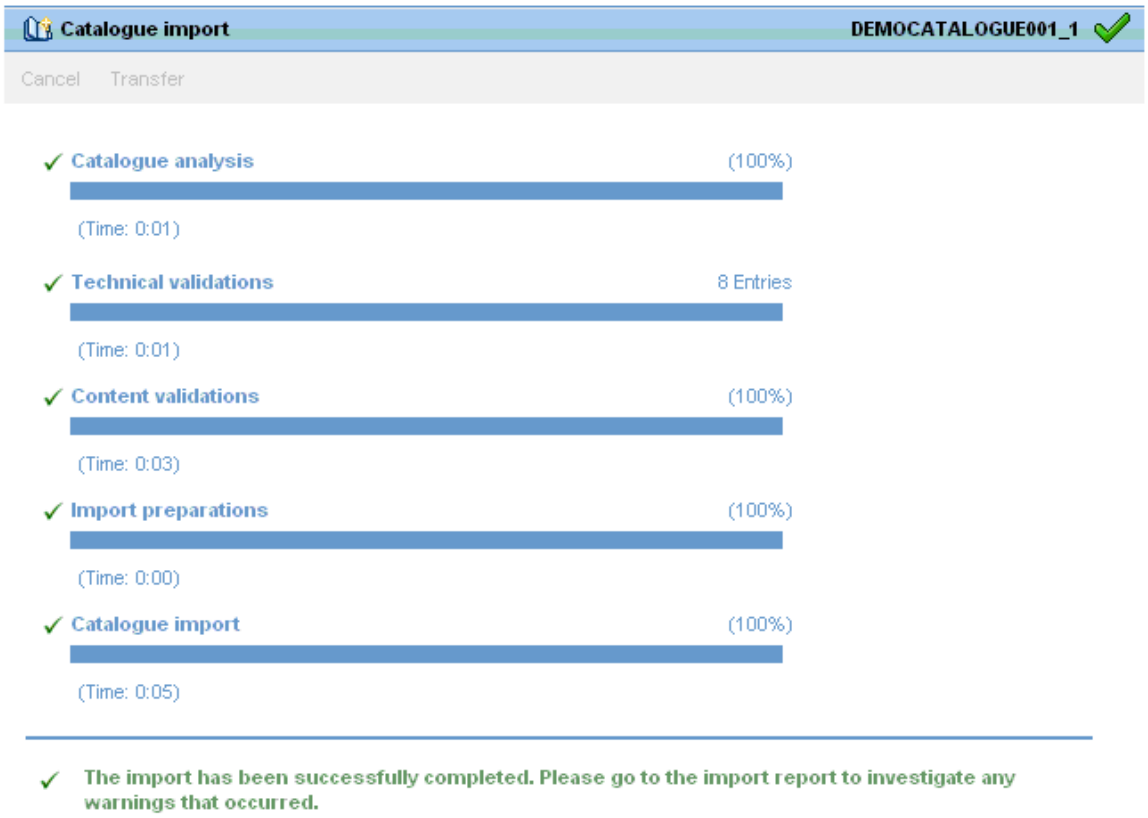
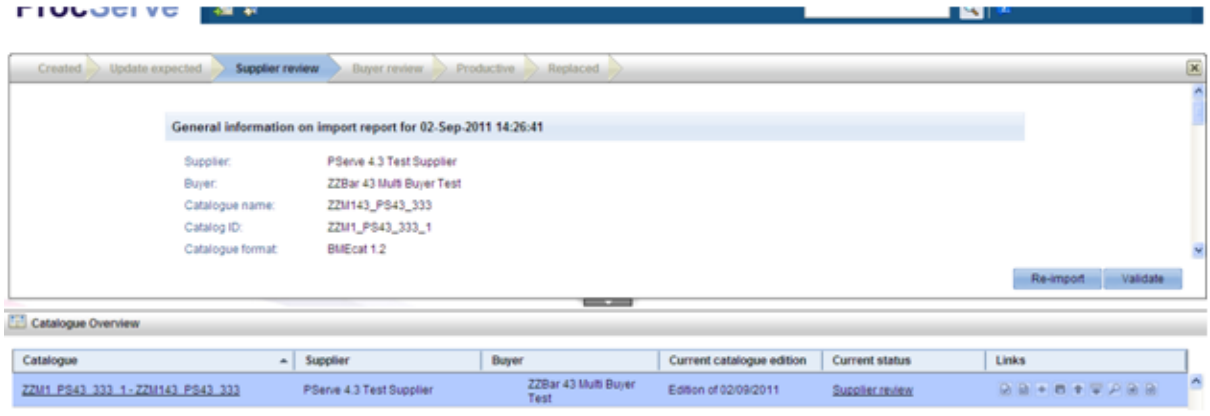


9. **Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen**

10. **The catalogue will now be in Supplier Review:**



Select Validate to run the validation report and then select Release to Buyer.

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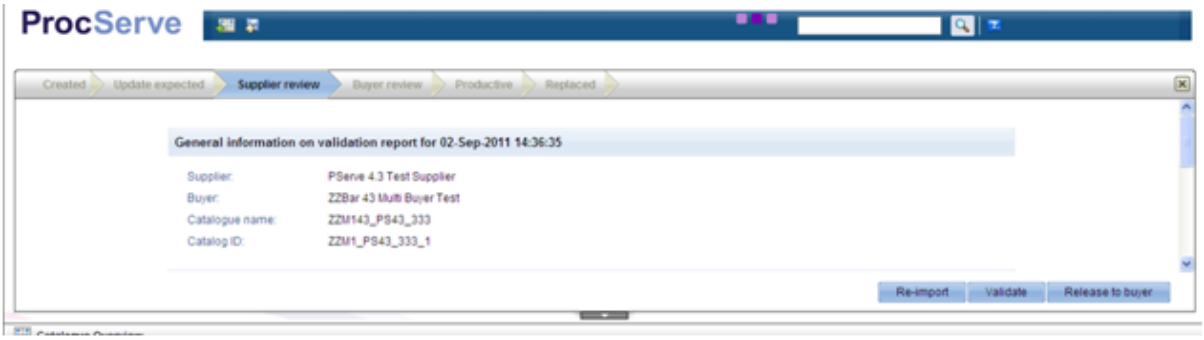
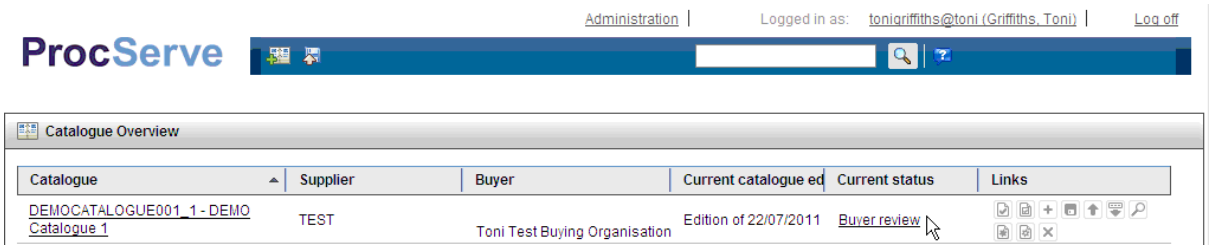


11. The catalogue will now be in Buyer Review:.



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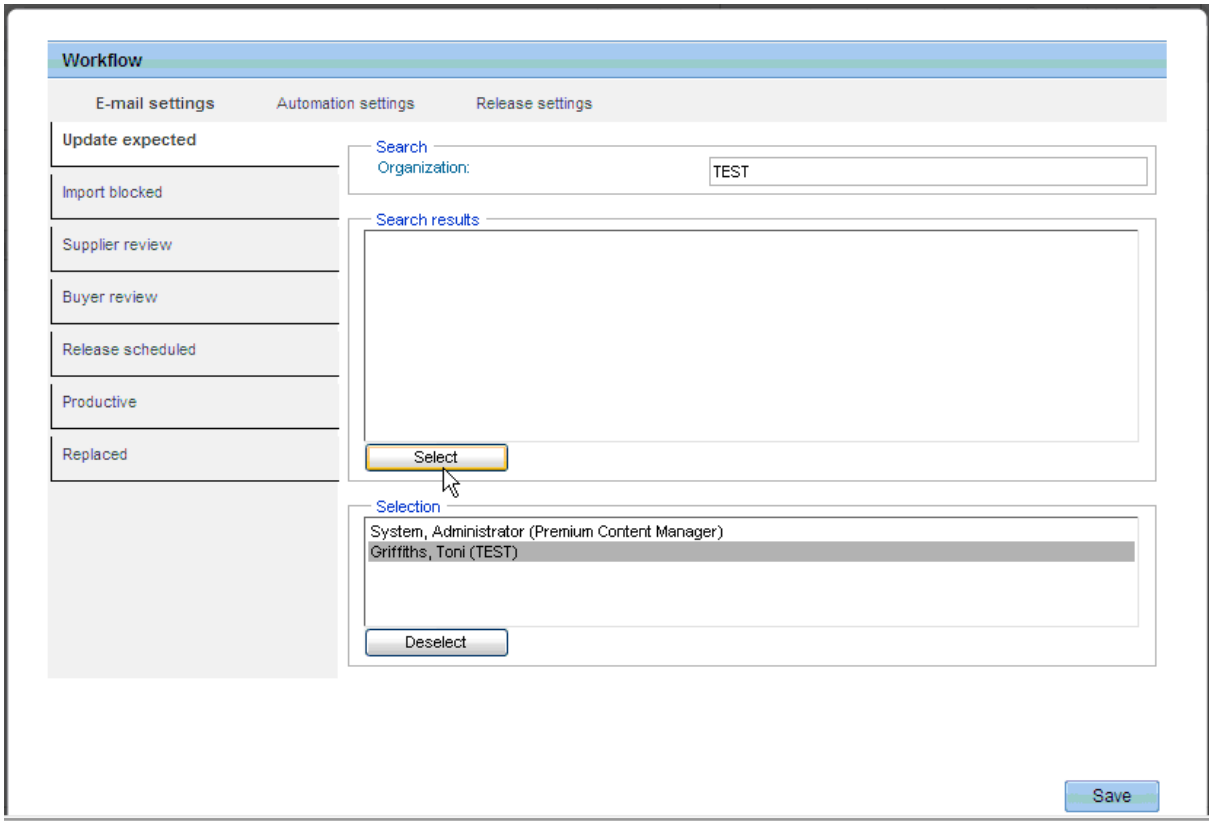
3.1.3 Configuring Catalogue Workflow

The workflow for the catalogue now needs to be configured to ensure that the necessary people from the buyer and supplier organisations are notified (by email) of catalogue changes and perform the appropriate administration duties for a particular catalogue. The workflow also determines if any steps are automated (for example supplier review in an initial load) as well as export options (such as scheduling). **Note:** The person/people selected for each workflow step is used to trigger an email notification and to give permission to users to complete tasks.

1. Select the catalogue workflow option:

2. Set up the email settings as required. Search for the relevant organisation on the top right:



3. Click on the relevant users and click on the select button (repeat as necessary):

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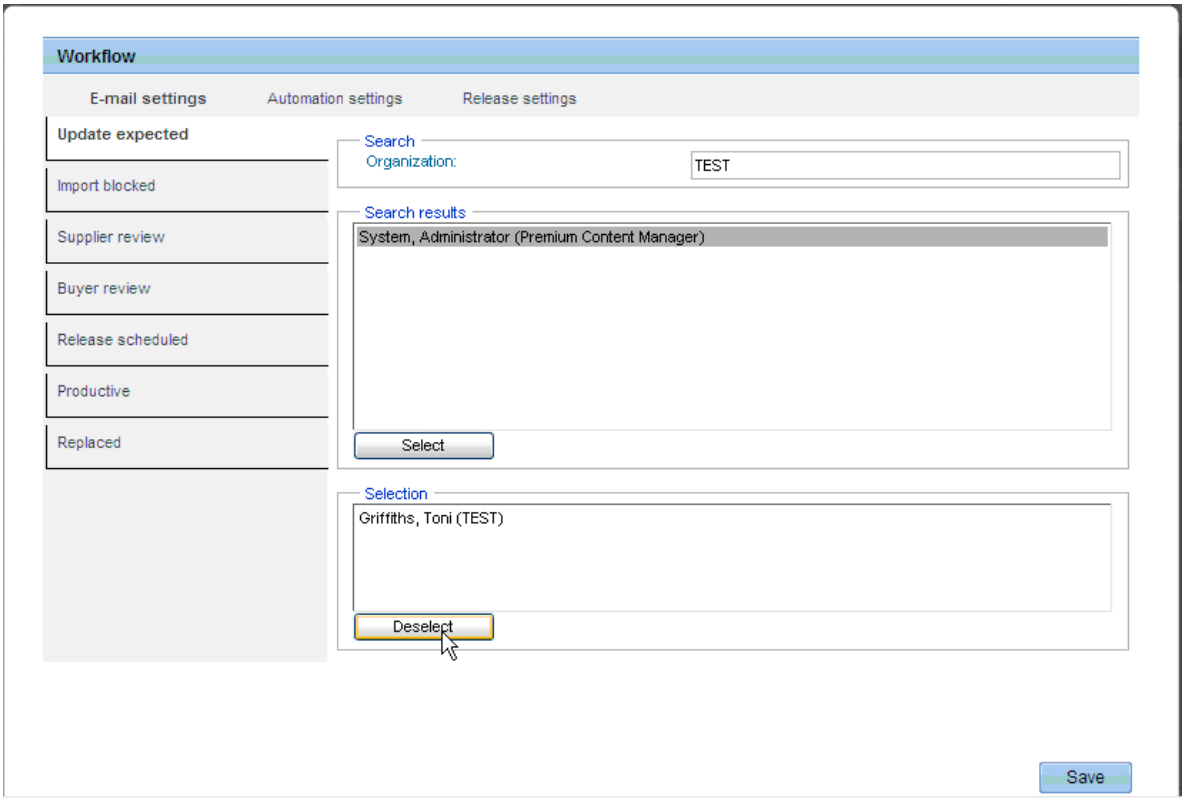
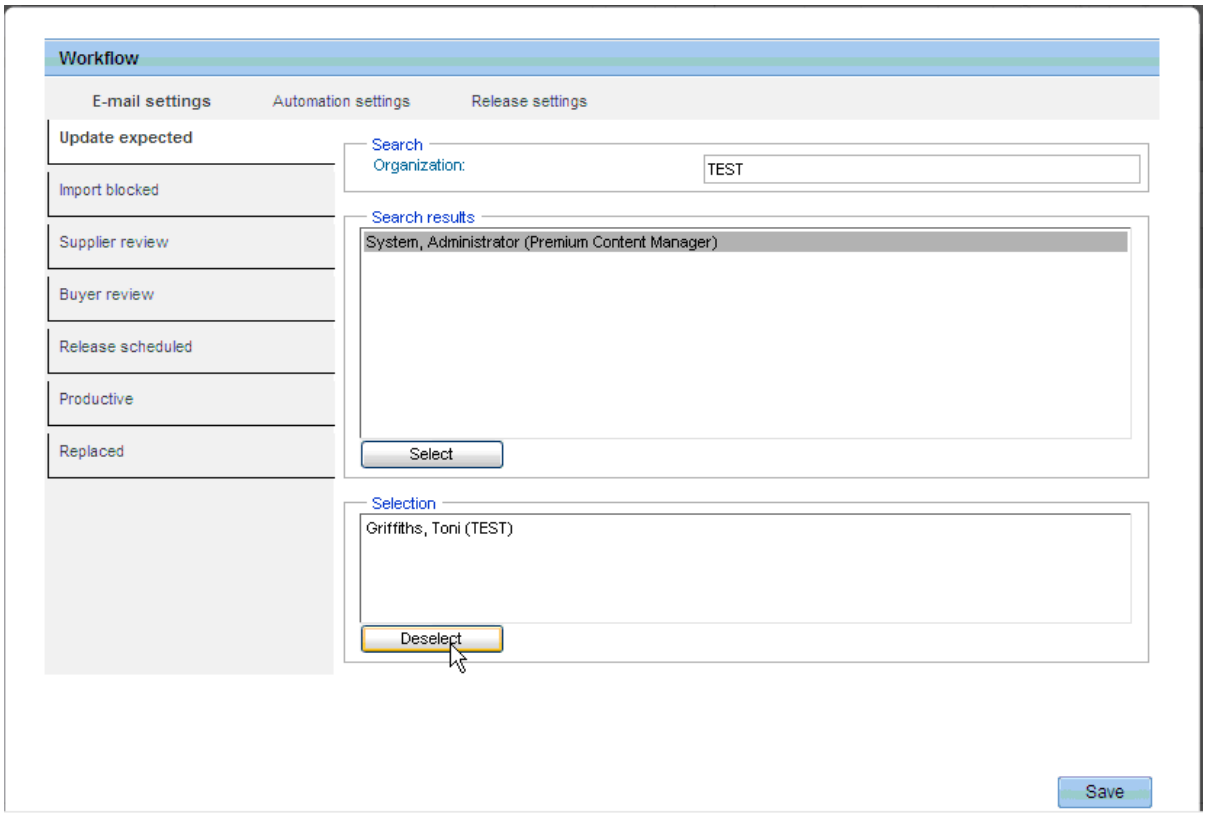


4. Click on any users within the selection that need to be removed and click on deselect (repeat as necessary):



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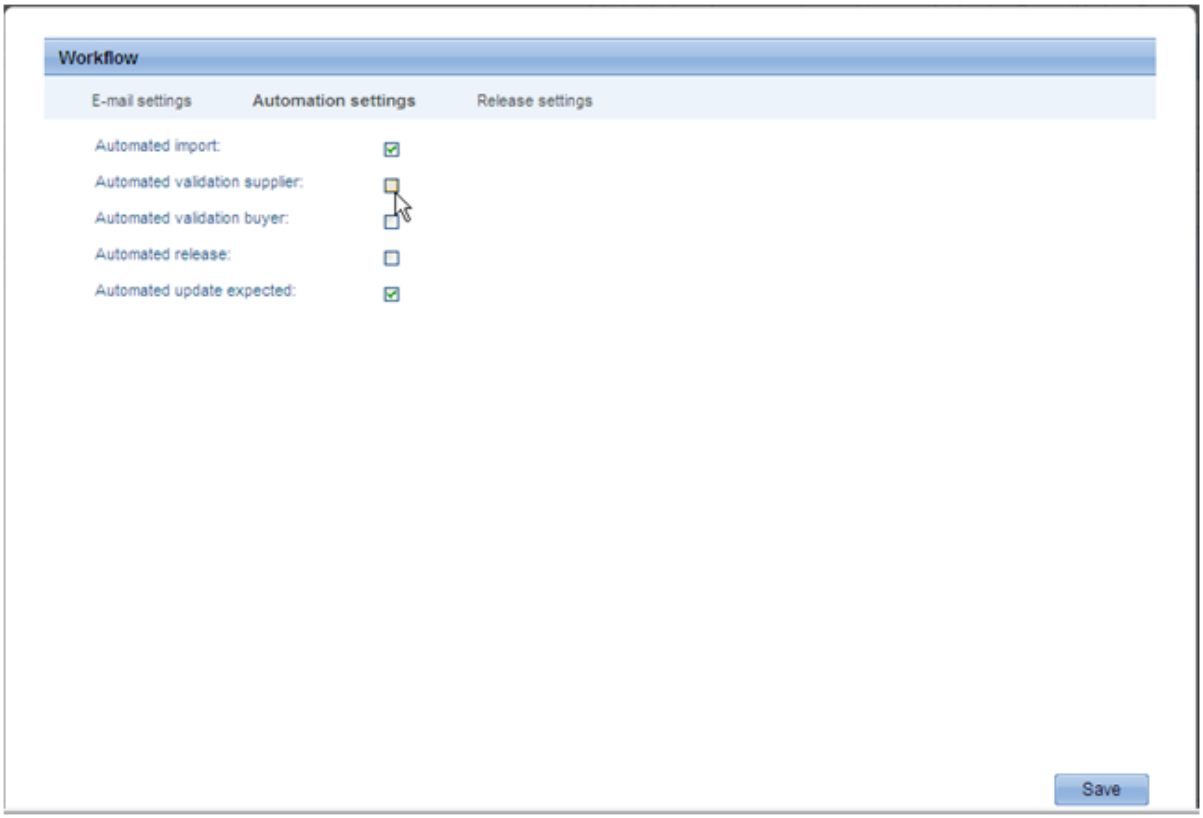
You need to set users for all 7 sections:

- Update Expected (Supplier Super User)
- Import Blocked (Supplier Super User)
- Supplier Review (Supplier Super User)
- Buyer Review (Buyer Super User)
- Release Scheduled (Buyer Super User)
- Productive (Buyer Super User)
- Replaced (Buyer Super User)

5. Ensure that the Automation settings are set as required (Click on Automation Settings)



Note: Suggested setting for standard catalogue is to deselect Automated validation supplier to enable Supplier Review status on subsequent loads

6. Check release settings are as required:

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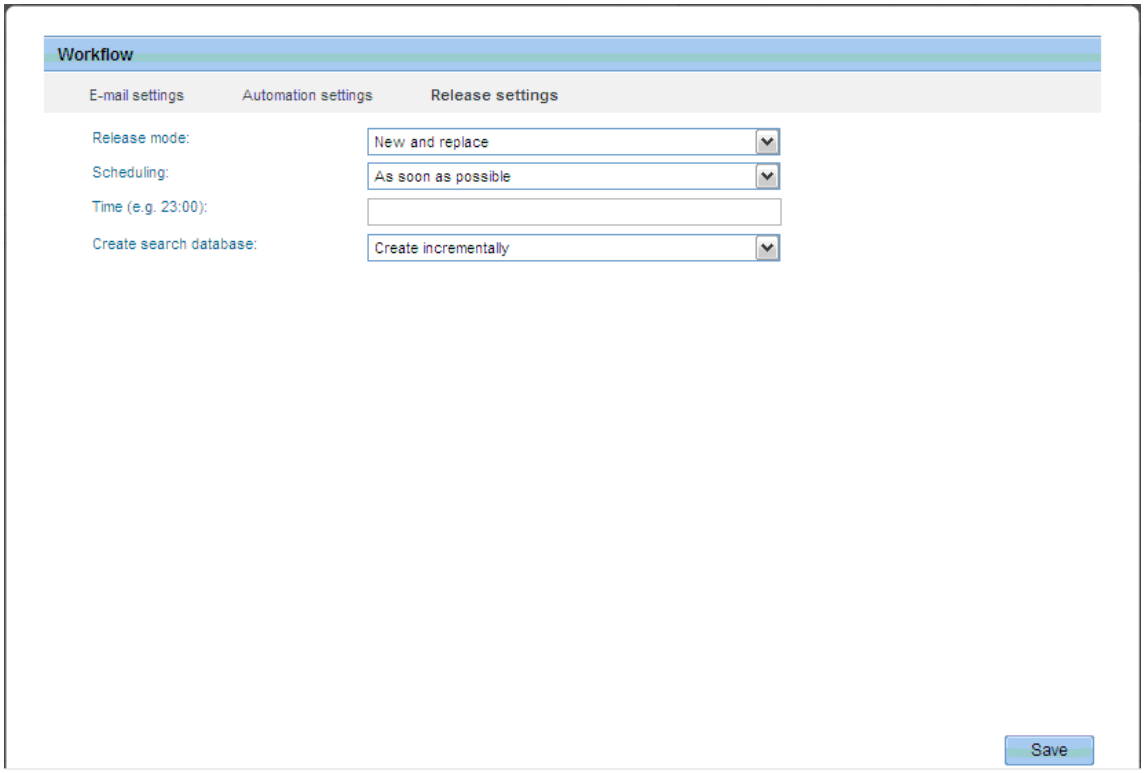

6. Click on Save

7. Click on close or click outside of the catalogue

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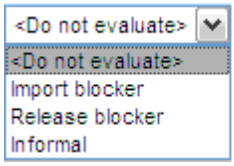
3.1.4 Validating your Catalogue

The catalogue will automatically inherit the standard validation that has been defined for all catalogues in your organisation. You are able to change the validations against a specific catalogue if you wish.

1. Amending the validation profile from your standard profile
Select the validation profile icon for your catalogue

To change the evaluation against a rule, select an option from the drop down list (options vary depending on the type of rule):



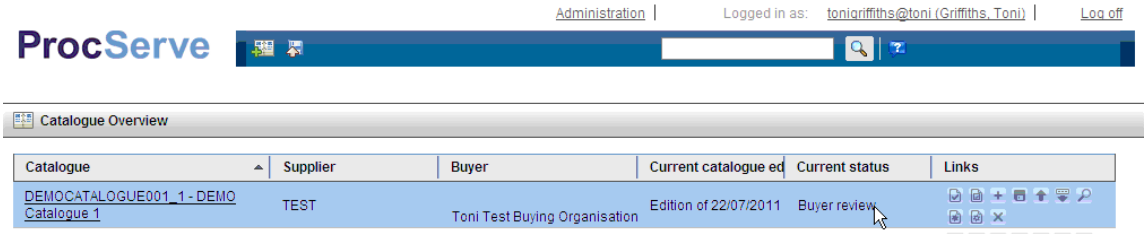
To add a rule, select a similar rule and click on the "Create a new rule based on this rule" icon

Change the required details and click on save

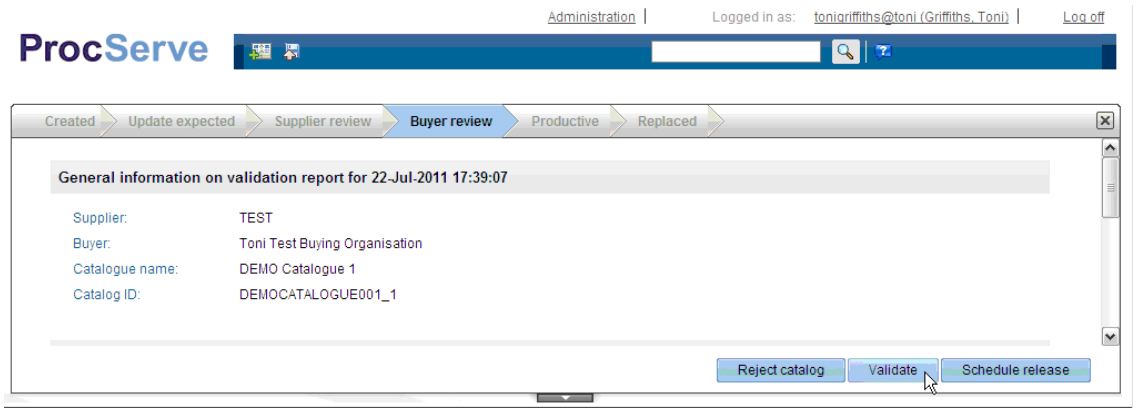
Tip: Ensure you give the rule a meaningful name so that others can recognise what that rule checks for

Tip: Do not amend rules as this amends the rule for all catalogues and organisations on the system.

2. Click on the Buyer Review status link for the catalogue:



3. Select Validate to validate the catalogue against the validation rules set for this catalogue:



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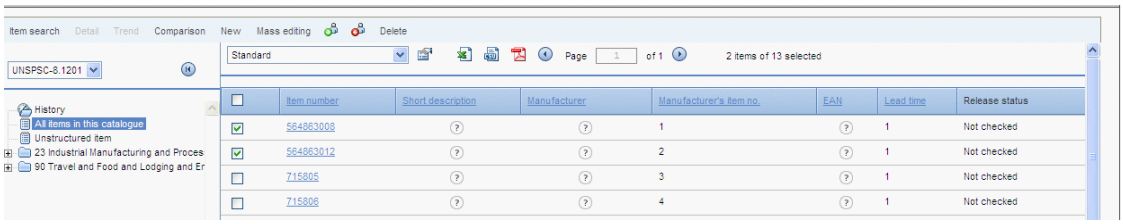
3.1.5 Approving your Catalogue

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer icon to review the catalogue items

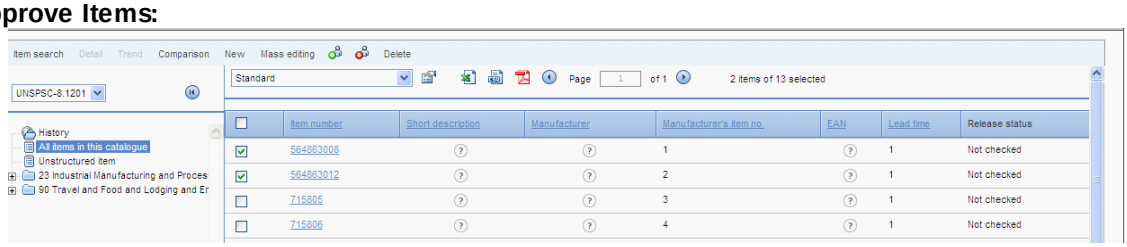


2. You can now approve and/or reject the items loaded:
Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon to the top right of the page. The item is now marked for rejection.

Note: You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

Approve Items:



When you are sure that an item is correct, you can check the relevant items and click the Approve icon to the top right of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

Note: If changes are required then you can both amend through the Procserve Catalogue Manager Catalogue explorer interface, or via the Procserve Catalogue Builder and re-import the file.

Note: Any new file imported will over write the old data where the header data is the same.

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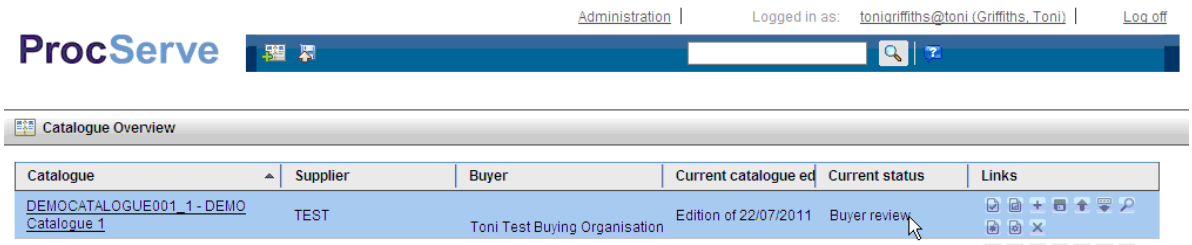
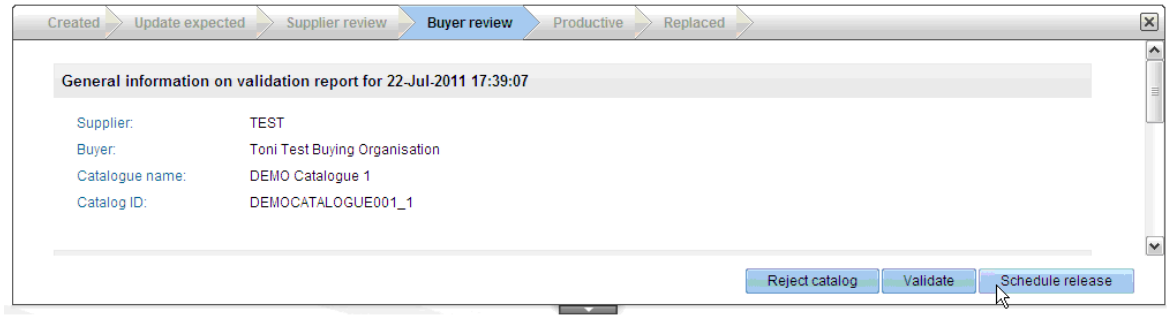
3.1.6 Exporting your Catalogue

You can now release your catalogue.

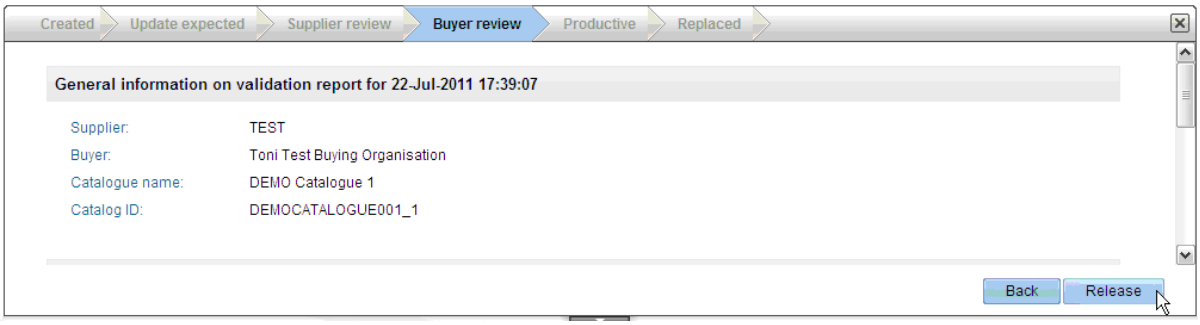
1. Click on the Buyer Review link for the catalogue



2. You can now select 'Schedule Release'



3. Then click on 'Release' to export the Catalogue



The catalogue will now be scheduled for release or released immediately according to the release settings configured for this catalogue.

The catalogue Status will now change to 'Update Expected'.

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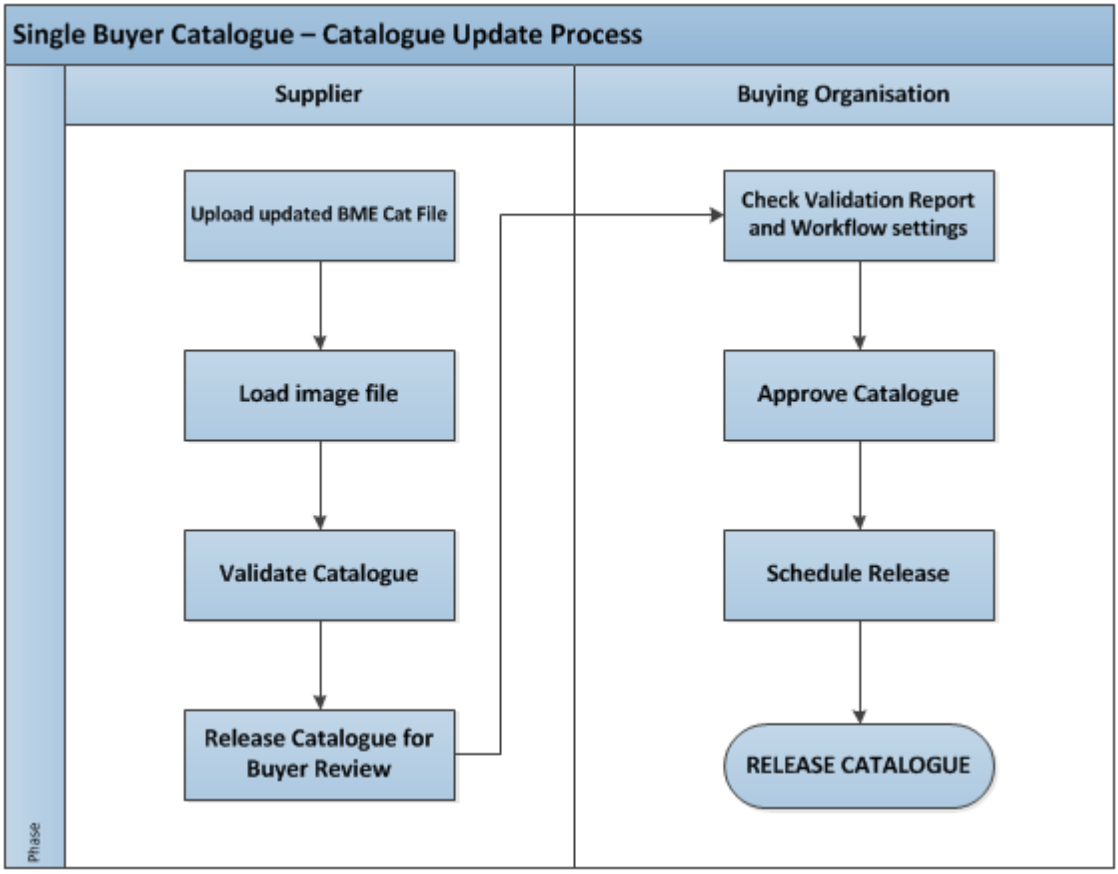
3.2 Single Buyer Catalogue Updates

3.2.1 Overview

This section describes the process a supplier will follow to load catalogue updates using a BMECat file.

Note: The updated load of a catalogue is normally performed by a supplier. Should you need to update a catalogue, for any reason, the below steps can be followed.

If the supplier is performing the update, please go to the Approving you Catalogue and Exporting your Catalogue within the multi-buyer catalogue section.



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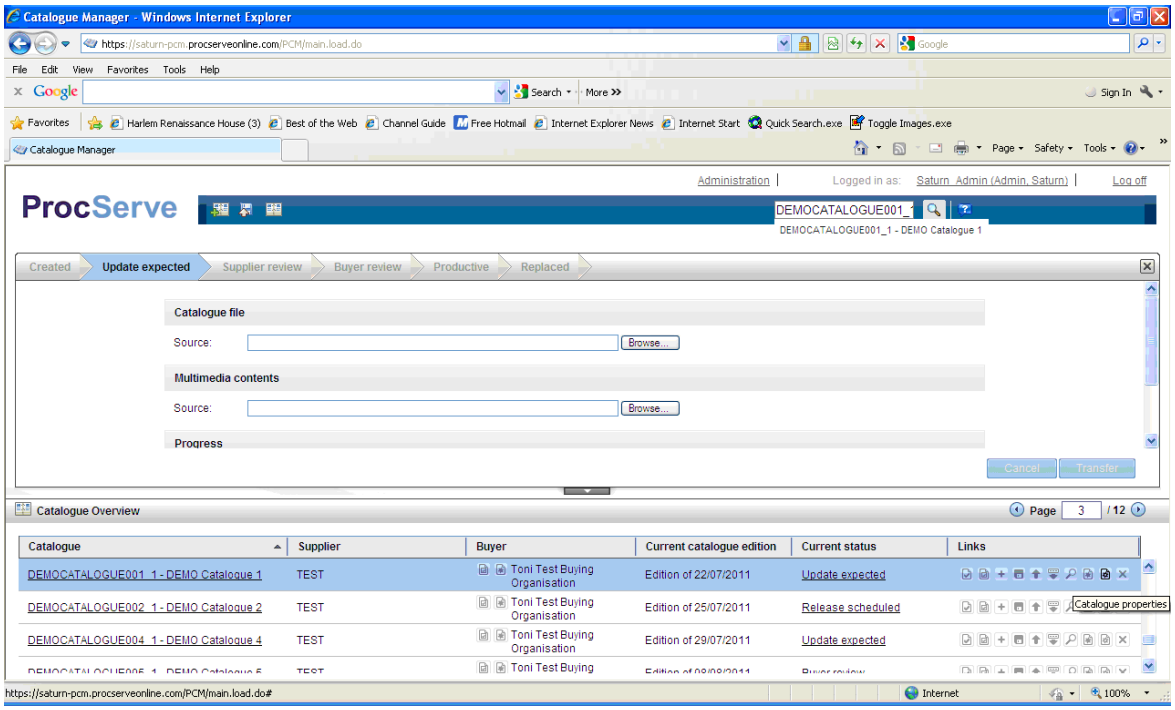
3.2.2 Importing the Updated Catalogue

The following steps should be completed by the supplier:

1. Navigate Admin Menu >> Catalogue Management.

2. The Catalogue Manager is displayed. Select the Catalogue and the actions that can be completed at this stage will be available.



3. Import BMECat File. Click the browse button on the catalogue file path:

Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.

4. Click the Transfer button in the right.

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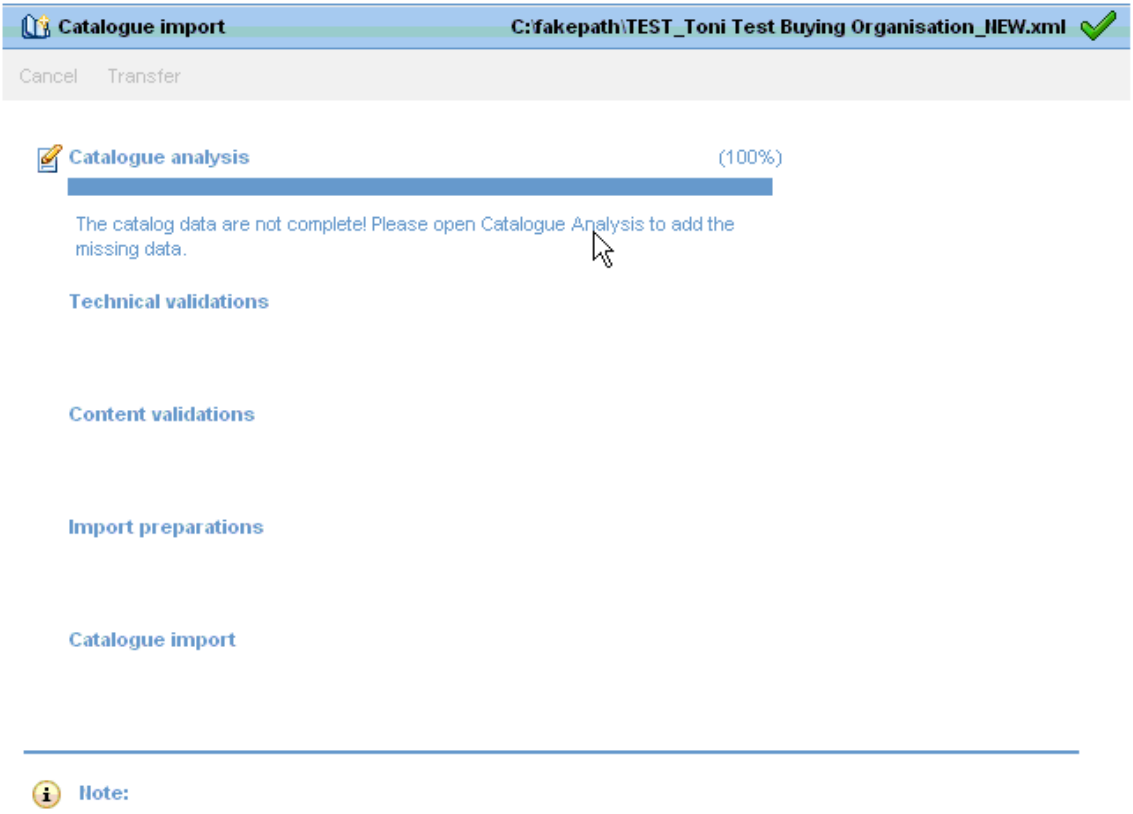

5. The Summary page is displayed:

6. Once the import is successfully completed the confirmation screen is displayed:

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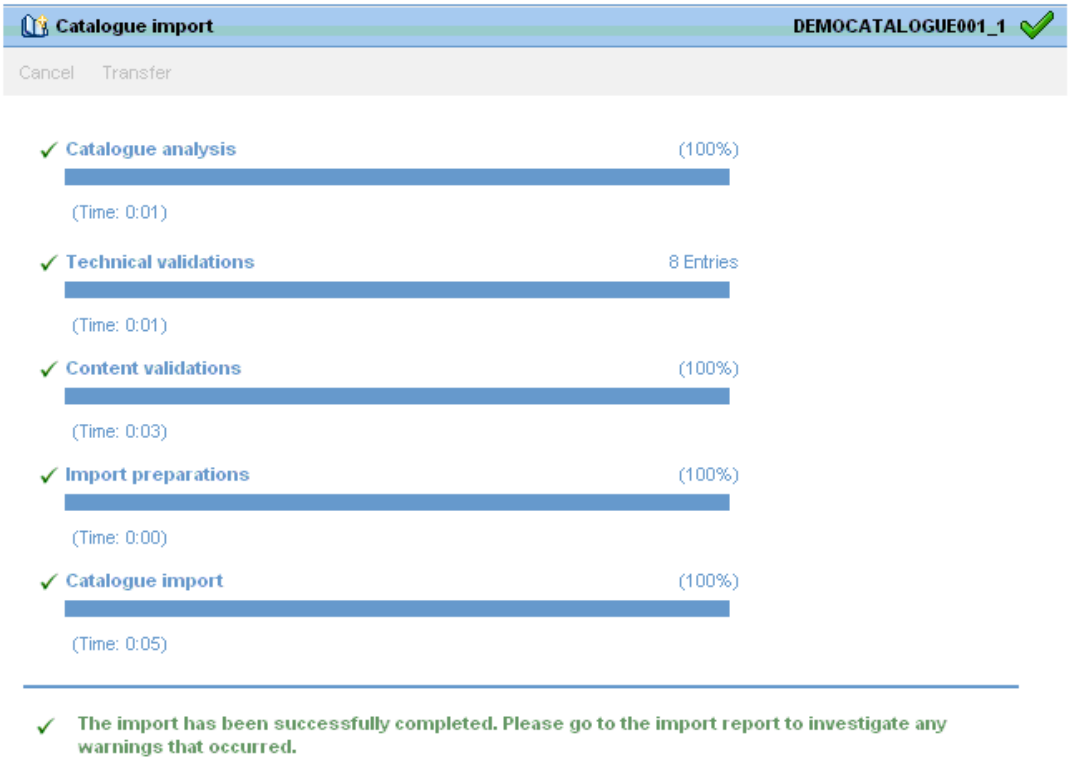
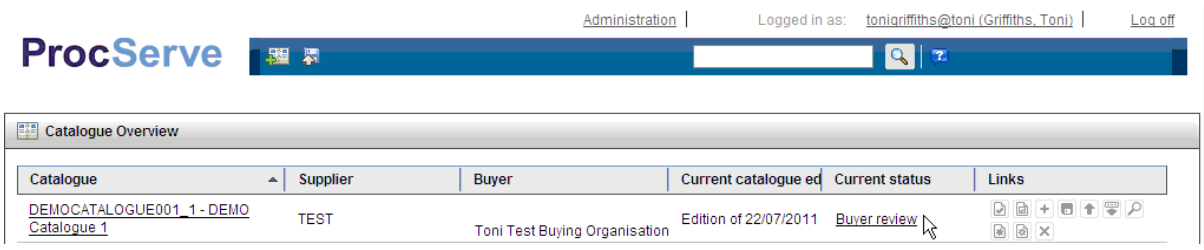


7. Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen

Note: Depending on the workflow configured for this catalogue, the catalogue will now go to Supplier Review. An email will be sent to the nominated supplier user to prompt them to complete this.



Buyer Review: Once a supplier has performed the upload they will release the catalogue to buyer review. The Procserve Catalogue Management System will automatically email you, providing the workflow was correctly configured, so you can complete the rest of the process.

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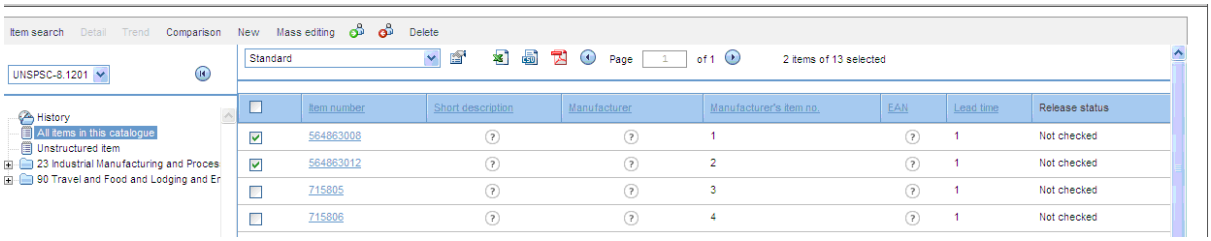
3.2.3 Approving your Catalogue

The buyer review is now required. The buyer contract manager will need to check and then approve the items / catalogue.

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer from Links.

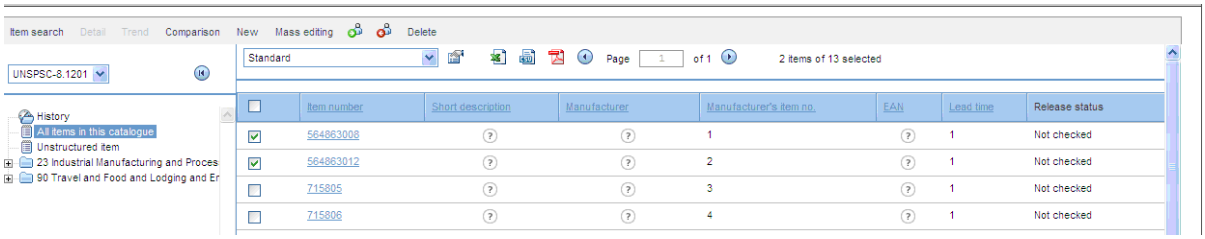


2. You can now approve and/or reject the items loaded: Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon to the top right of the page. The item is now marked for rejection.

Note: You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

Approve Items:



3. When you are sure that an item is correct, you can check the relevant items and click the Approve icon to the top right of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

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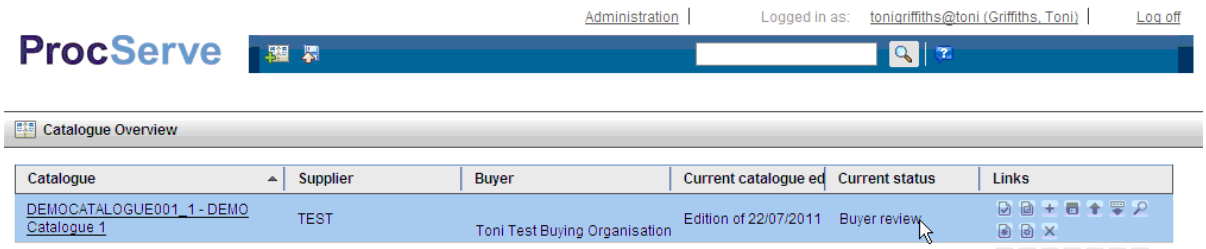
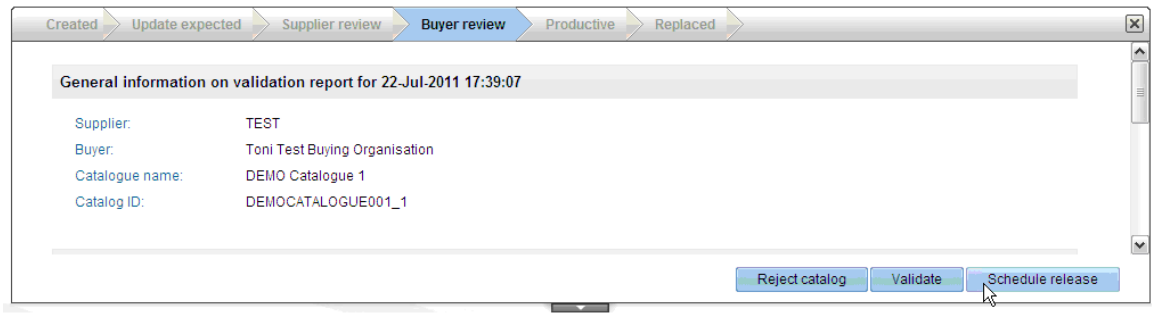
3.2.4 Exporting your Catalogue

You can now release your catalogue.

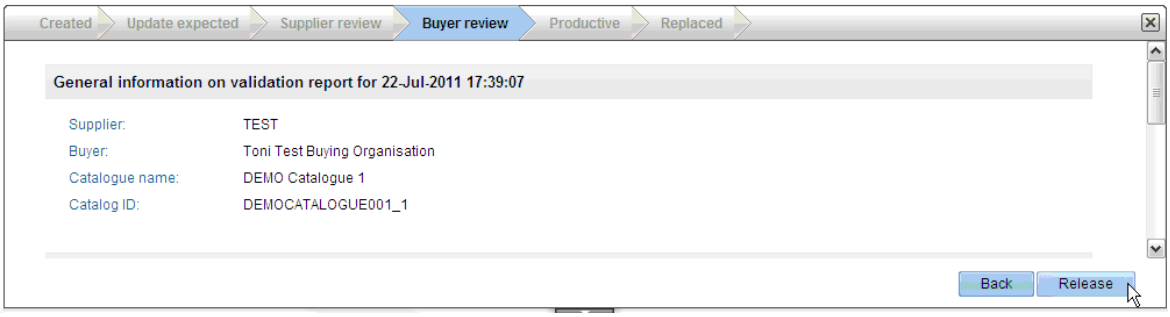
1. Click on the Buyer Review link for the catalogue



2. You can now select 'Schedule Release'



3. Then click on 'Release' to export the Catalogue



The catalogue will now be scheduled for release or released immediately according to the release settings configured for this catalogue.

The catalogue Status will now change to 'Update Expected'.

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